

**7/25/77 [2]**

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Vernon Jordan  
Red - five  
Campaign promises  
Panor Mitchell balance budget  
National Urban League  
July 25, 1977  
Jobs  
Among my first acts as President were proposals not just  
PAT

to stimulate the overall economy, but specifically to provide jobs for GRACIA  
teenagers in the inner cities. We increased the summer youth JOE  
employment program to over 1 million jobs, more than ever in history. RAY  
Elean  
We proposed a youth employment program with \$1.5 billion for jobs for  
unemployed youth, we have doubled the size of the Job Corps, and we  
more than doubled the public service jobs for the unemployed -- from  
310,000 to 725,000 -- nearly half of those for the long-term unemployed.

\* \* \* \*

Soon we will be sending the Congress our proposals for  
welfare reform. Jobs will be the thrust behind our reform program.  
Our goal is for all those who want work to be able to find work, so  
that they can be independent and proud and self-sufficient. We will  
propose more than 1 million public service jobs as part of the program.

\* \* \* \*

But let me mention a few other areas of major concern.  
We've proposed an \$18.9 million program to immunize 5-1/2 million

poor children from preventable diseases over the next 30 months.

We will raise the number of poor children screened for medical problems from 1.9 million last year to 9.8 million in 1982.

\* \* \* \*

I said during the campaign that the tax system was a disgrace, that it was most unfair to the people with low and average incomes. We've been working for six months on a tax proposal that will be simpler and fairer, and will reduce the burden on the average American.

\* \* \* \*

We've proposed increased Title I assistance, which helps poor children get better elementary, secondary, and vocational education, by \$350 million.

\* \* \* \*

We have made a major expansion in countercyclical revenue sharing, and I recently signed into law a \$4 billion public works jobs bill. Under a new urban program we are proposing, <sup>PATRICIA HARRIS</sup> the Secretary of HUD will have the authority to target large amounts of aid to areas that most need help -- and to encourage private investment in urban America.

\* \* \* \*

~~One of the~~



One of the first tasks in my Administration's reorganization effort has been to work out ways to handle discrimination complaints faster and more effectively than we have in the past. The Equal Employment Opportunity Commission now has a backlog of 130,000 cases. Many cases aren't considered for three years; most are closed simply because they have dragged on so long, the victims have given up. This will be one of the top priorities of the person I have named to head the Commission -- Eleanor Holmes Norton. Last week I issued an order to all department heads emphasizing how important I consider enforcement of Title VI of the Civil Rights Act. There will be no exception to the rule that the government of all the people should not support programs that discriminate against any of our people on the basis of race, color or national origin. No matter how important the program or how urgent the goals, they do not excuse violating any of our laws, especially those on discrimination.

\* \* \* \*

Human Rights - Andy Young

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for Preservation Purposes**

---1. UNEMPLOYMENT

UNEMPLOYMENT HAS DECLINED FROM 8% IN NOVEMBER TO 7.1% NOW AND WE EXPECT IT TO GO BETWEEN 6.5% AND 6.7% BY THE END OF THIS YEAR AS OUR JOBS PROGRAM BEGINS TO HAVE AN IMPACT.

---2. TAX REFORM

I HAVE ALREADY SIGNED INTO LAW OUR PROPOSAL TO REDUCE TAXES PERMANENTLY BY A TOTAL OF \$4 BILLION BY INCREASING THE STANDARD DEDUCTION; THIS BENEFITS MIDDLE AND LOW INCOME TAXPAYERS ALMOST EXCLUSIVELY. A PERSON EARNING \$10,000 WILL GET A 30% REDUCTION IN HIS TAXES.

---3. JOB CREATION

A) PUBLIC WORKS JOBS PROGRAM

OUR \$4 BILLION PUBLIC WORKS JOBS PROGRAM BILL, WHICH I SIGNED LAST MONTH, IS NOW GOING INTO EFFECT; THE FIRST CONTRACTS WERE SIGNED LAST WEEK FOR LESS THAN 1% OF THE AMOUNT APPROPRIATED; WE WILL PROCESS 1,000 CONTRACTS PER WEEK AND WILL HAVE ALL \$4 BILLION ALLOCATED BY SEPTEMBER 30. FOR THE FIRST TIME 10% OF EVERY CONTRACT MUST GO TO A MINORITY SUBCONTRACTOR OR SUPPLIER -- WHICH WOULD MEAN \$400 MILLION DIRECTLY TO MINORITY BUSINESSES

## B) PUBLIC SERVICE JOBS

CONGRESS HAS GIVEN US THE AUTHORITY, WHICH WE REQUESTED, TO INCREASE THE NUMBER OF PUBLIC SERVICE JOBS FROM 310,000 TO 600,000 BY SEPTEMBER 30 AND TO 725,000 BY NEXT SEPTEMBER. WE HAVE MADE A FAST START IN IMPLEMENTING THIS PROGRAM AND ARE NOW UP TO 400,000 JOBS -- AND WE'RE ADDING 15,000 JOBS PER WEEK.

## c) YOUTH UNEMPLOYMENT

OUR PROPOSAL FOR YOUTH EMPLOYMENT HAS NOW PASSED A SENATE-HOUSE CONFERENCE AND I EXPECT TO HAVE IT AT THE WHITE HOUSE FOR SIGNATURE NEXT WEEK. IT IS A \$1.5 BILLION PROGRAM TO CREATE OVER 200,000 JOBS IN A NATIONAL YOUTH CONSERVATION CORPS, YOUTH COMMUNITY CONSERVATION AND EMPLOYMENT PROJECTS AND COMPREHENSIVE YOUTH EMPLOYMENT AND TRAINING PROGRAMS. IN ADDITION WE ARE DOUBLING THE JOB CORPS PROGRAM TO 40,000 SLOTS.

## 4) INCOME SECURITY.

A) WE HAVE PROPOSED A PROGRAM TO MAINTAIN THE FISCAL INTEGRITY OF THE SOCIAL SECURITY SYSTEM FOR THE NEXT 75 YEARS WITHOUT RAISING THE TAX RATE ON AMERICAN WORKERS BEYOND THOSE ALREADY SCHEDULED IN THE LAW.

## B) FOOD STAMPS

WE HAVE PROPOSED AND THE SENATE HAS APPROVED OF THE ELIMINATION OF THE PURCHASE REQUIREMENT WHICH WILL PERMIT MILLIONS OF OUR POOREST CITIZENS TO PARTICIPATE IN THIS PROGRAM. SIMILAR ACTION WILL BE TAKEN THIS WEEK IN THE HOUSE.

## ---5. HEALTH POLICY

## A) CHAPS

WE HAVE PROPOSED A PROGRAM TO RAISE THE NUMBER OF ELIGIBLE LOW INCOME CHILDREN BEING GIVEN COMPREHENSIVE HEALTH SCREENS FROM 1 MILLION TO OVER 10 MILLION IN THE NEXT FIVE YEARS. THIS PROGRAM IS MAKING GOOD PROGRESS IN THE CONGRESS.

## B) IMMUNIZATION

WE HAVE PROPOSED A \$18.6 MILLION PROGRAM TO IMMUNIZE 5.5 MILLION LOW INCOME CHILDREN OVER THE NEXT 30 MONTHS.

## C) HOSPITAL COST CONTAINMENT

WE HAVE PROPOSED A PROGRAM TO SHARPLY DECREASE HOSPITAL COSTS. HEARINGS HAVE BEEN COMPLETED IN BOTH THE HOUSE AND THE SENATE COMMITTEES AND COMMITTEE MARKUPS WILL SOON BEGIN.



D) MEDICARE PREMIUM FREEZE

IN ORDER TO PROTECT THE ELDERLY WE HAVE PROPOSED A FREEZE ON MEDICARE, PART B OPTIONAL MEDICAL CARE PREMIUMS, WHICH WILL SAVE THE ELDERLY \$37 MILLION THIS YEAR AND \$182 MILLION IN 1978.

---6) COMMUNITY DEVELOPMENT

A) WE HAVE PROPOSED A NEW \$400 MILLION PROGRAM TO PERMIT THE SECRETARY OF HOUSING AND URBAN DEVELOPMENT TO PIN POINT AID TO SEVERLY DESTRESSED CITIES AND TO ENCOURAGE PRIVATE INVESTMENT.

B) COMMUNITY BLOCK GRANT

WE HAVE PROPOSED A \$5 BILLION INCREASE IN BUDGET AUTHORITY AND HAVE PROPOSED NEW FORMULAS TO TARGET AID TO ASSIST OLDER CITIES WITH THE GREATEST NEED. THIS PROGRAM AND THE URBAN DEVELOPMENT ACTION GRANT ARE NOW IN HOUSE-SENATE CONFERENCE.

c) HOUSING

I HAVE SIGNED THE BILL PROVIDING FOR A SUBSTANTIAL INCREASE IN SECTION 8 HOUSING, WHICH ALSO CREATES NEIGHBORHOOD COMMISSION TO LOOK AT WAYS TO REVITALIZE OUR NEIGHBORHOODS

7) EDUCATION AND SOCIAL SERVICES

A) WE HAVE PROPOSED A \$350 MILLION INCREASE IN TITLE I FUNDS FOR ELEMENTARY AND SECONDARY EDUCATION TARGETED AT DISADVANTAGED STUDENTS.

B) WE HAVE PROPOSED AN EXTENSION OF \$200 MILLION IN SEPARATE FUNDING FOR PRIVATE DAY CARE SERVICES. ACTION BY BOTH HOUSES OF CONGRESS IS NEAR.

C) I RECENTLY PROPOSED MAJOR REFORMS IN THE FOSTER CARE SYSTEM TO MORE READILY PERMIT ADOPTIONS

I've mentioned a lot of figures to you. I've talked about a lot of programs we've had passed, about a lot of money that's been appropriated.

And I think a lot of you probably have a very legitimate question in your minds. "He's talking about a lot of money, about a lot of help, but I haven't seen that money or that help in my community yet."

And you're right. You haven't seen that help. Not yet. We have passed these programs, we have appropriated these funds. But the action on them has come so recently that they haven't gone out yet.

For example, in the \$4 billion public works bill, the first contracts have been signed only last week for less than one percent of the amount appropriated. We will process 1,000 contracts per week and all \$4 billion will be allocated by September 30. For the first time, 10% of every contract must go to a minority subcontractor or supplier -- which would mean \$400 million directly to minority businesses.

We are doubling the number of public service jobs from 310,000 to 600,000 by September 30 and 725,000 by next September, but less than 25% of that increase has taken place so far, since the program

only began in June

only began in June -- and we're adding 15,000 jobs per week.

So that's what I'm talking about when I rattle off all those figures. I'm talking about real money going to help real people in need of that help.

I'm not speaking of abstract figures, meaningless statistics. I'm talking about money and programs which will be coming into communities across this nation in the weeks and months ahead.

I'm talking about my Administration living up to its commitments to the poor, and the hungry, and the unemployed.



And I'm talking about all of us -- you and me -- working to make this a better place to live in, a better nation for us all.



I THINK IT'S INCUMBENT THAT BEFORE THE LEADERS OF ANY ORGANIZATION SPEAK THEY KNOW THE FULL FACTS.

CRITICISM IS VITAL TO A DEMOCRATIC SOCIETY, BUT TO BE MEANINGFUL IT MUST BE BASED ON REALITY AND NOT FICTION.

I TRY TO DEAL WITH FACTS AS PRESIDENT AND I HOPE OTHERS WILL DO LIKEWISE.

HERE ARE SOME FACTS ON MY ADMINISTRATION'S PROGRAMS....

Memorandum to the President

From: Jim Fallows and Achsah Nesmith

*Achsah*

About: Urban League Speech

This incorporates Stuart Eizenstat's suggestions and has been gone over him by in final form. Jim will be away most of the weekend. Achsah will let the operator know where she can be reached whenever she is away from home.

*Put on speech  
typewriter*

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for Preservation Purposes**



## Urban League Speech

### (Introduction)

I'm particularly glad to be here today because Vernon Jordan and I go way back and because he's been saying such nice things about me and our programs lately. He showed political wisdom even in his youth -- he was an officer in a club in college that included in its membership all six Democrats on campus.

Vernon was born in Atlanta, but his people were farmers in southwest Georgia just like mine. He's devoted his life to the cause of equal rights. When the University of Georgia was integrated, Vernon physically shielded Charlayne Hunter from an angry mob so she could enter the campus. He is a perfect leader for a group like the Urban League. You have worked for 67 years to provide equal opportunity for jobs and education and health and welfare services, and your record is second to none for hard accomplishment. Your Operation Big Vote was typical of the way you go and do something about problems instead of just complaining about them. But Vernon has had a lot of experience with registering voters -- when he headed the Voter Education Project hundreds of thousands of black people in the South registered for the first time. As a result the number of black elected officials went from 72 to 564.

In the last few days we've been reminded of the terrible consequences for our nation when we deny large numbers of our people jobs -- the hope and dignity that come from honest work.

There can be no excuse for looting and burning. It hurts the hardworking and the helpless in the neighborhoods most.

But people with hope don't burn their houses down around them. People with jobs have a stake in their communities and want to build, not destroy.

I promised you during the campaign that we would put our people back to work. This Administration has never lost sight of that necessity. The first step toward all our economic goals is to put our people back to work. We can't fight inflation or balance the budget without high employment.

Unemployment among black teenagers in poverty areas of our cities is running right at 50 per cent. Among black teenagers all over the country it is close to 40 per cent. The overall unemployment rate has gone down from 8 per cent in November to 7.1 per cent in June. White unemployment dropped from 7.3 to 6.3 per cent during that period. But the unemployment rate for black people of all ages has remained close to the 13.2 per cent level it was in June.



We can't let that continue. Among my first acts as President were proposals not just to stimulate the overall economy, but specifically to provide jobs for teenagers in the inner cities. We increased the summer youth employment program to over 1 million jobs, more than ever in history. We proposed a youth employment program with \$1.5 billion for jobs for unemployed youth, we have doubled the size of the Job Corps, and we more than doubled the public service jobs for the unemployed -- from 310,000 to 725,000 -- nearly half of those for the long-term unemployed.

Soon we will be sending the Congress our proposals for welfare reform. Jobs will be the thrust behind our reform program. Our goal is for all those who want work to be able to find work, so that they can be independent and proud and self-sufficient. We will propose more than 1 million public service jobs as part of the program. If people can't work, we must provide adequately for their needs, so they can live decently and with dignity. We want to make the system simpler, more uniform, and more humane. Where there is fraud either by recipients or the people who are supposed to be helping them, we want to stop it, so the money spent goes to those who truly need it. Poor people want to work just like everybody else -- they want to control their own lives and destinies. Public jobs are part of the answer, but they can't do it alone -- the ultimate solution has to come from permanent jobs in the private sector.

I won't try this morning in just a few minutes to go over all the things that we are doing -- Pat Harris and Ray Marshall and Joe Califano and Griffin Bell will be talking to you about them.

But let me mention a few other areas of major concern. We've proposed an \$18.9 million program to immunize 5 1/2 million poor children from preventable diseases over the next 30 months. We will raise the number of poor children screened for medical problems from 1.9 million last year to 9.8 million in 1982. We'll provide incentives so that the states follow-up screening with necessary treatment, and so that they create comprehensive health centers in neighborhoods which now lack medical care. We are trying to freeze the premiums which elderly people must pay for Medicare. We've taken the first step toward national health insurance with our proposal to hold down hospital costs, and we'll submit our proposals for national health insurance to Congress next year.

I said during the campaign that the tax system was a disgrace, that it was most unfair to the people with low and average incomes. We've been working for six months on a tax proposal that will be simpler and fairer, and will reduce the burden on the average American. We've raised the level of basic opportunity grants which help low and moderate income families send their children to college. We've proposed



increased Title I assistance, which helps poor children get better elementary, secondary, and vocational education, by \$350 million.

We've also begun to help our hard pressed cities, by increasing the level of public aid, and by making sure our existing aid programs go where they are most needed. We have made a major expansion in countercyclical revenue sharing, and I recently signed into law a \$4 billion public works jobs bill. Under a new urban program we are proposing, the Secretary of HUD will have the authority to target large amounts of aid to areas that most need help -- and to encourage private investment in urban America.

Within the limits of its knowledge and its resources, our government has an obligation to try to better the lives of all American people. Nowhere is this obligation clearer than in enforcing our civil rights laws. One of the first tasks in my Administration's reorganization effort has been to work out ways to handle discrimination complaints faster and more effectively than we have in the past. The Equal Employment Opportunity Commission now has a backlog of 130,000 cases. Many cases aren't considered for three years; most are closed simply because they have dragged on so long, the victims have given up. This will be one of the top priorities of the person I have named to head the Commission -- Eleanor Holmes Norton. Last week I issued an order to all department

heads emphasizing how important I consider enforcement of Title VI of the Civil Rights Act. There will be no exception to the rule that the government of all the people should not support programs that discriminate against any of our people on the basis of race, color or national origin. No matter how important the program or how urgent the goals, they do not excuse violating any of our laws, especially those on discrimination.

Where possible this will be done by administrative means -- withholding or denying funds. But there are instances where court action is the only solution. I have instructed the department heads to make sure such instances get to the Attorney General for prompt and vigorous action.

I believe in appointments and promotions on the basis of merit, as you do. But like you, I know that there are people who see merit only in the name of the school a person attended or who his family knows, rather than looking at the skills and talents and character of the individual.

Where there has been discrimination in the past there must be special efforts to overcome it. Where the results of discrimination live on we must take affirmative action to correct it.

All of us share a vision of an America in which all our people are free, and all are treated fairly. You have stayed true to that vision. So have I. Let us work together to make it come to pass.



PROPOSE THAT THIS BE THE END OF THE  
SPEECH... THAT YOU CITE THE PROGRAMS AS YOU  
WOULD NORMALLY, THEN FINISH WITH THIS...

Rex

I've mentioned a lot of figures to you. I've talked about a lot of programs we've had passed, about a lot of money that's been appropriated.

And I think a lot of you probably have a very legitimate question in your minds. "He's talking about a lot of money, about a lot of help, but I haven't seen that money or that help in my community yet."

And you're right. You haven't seen that help. Not yet.

We have passed these programs, we have appropriated these funds. But the action on them has come so recently that they haven't gone out yet.

For example, in the \$4 billion public works bill, the first contracts have been signed only last week for less than one percent of the amount appropriated. We will process 1,000 contracts per week and all \$4 billion will be allocated by September 30. For the first time, 10% of every contract must go to a minority subcontractor or supplier -- which would mean \$400 million directly to minority businesses.

We are doubling the number of public service jobs from 310,000 to 600,000 by September 30 and 725,000 by next September, but less than 25% of that increase has taken place so far, since the program only began in June -- and we're adding 15,000 jobs per week.

... and so on ...

So that's what I'm talking about when I rattle off all those figures. I'm talking about real money going to help real people in need of that help.

I'm not speaking of abstract figures, meaningless statistics. I'm talking about money and programs which will be coming into communities across this nation in the weeks and months ahead.

I'm talking about my Administration living up to its commitments to the poor, and the hungry, and the unemployed.

And I'm talking about all of us--you and me-- working to make this a better place to live in, a better nation for us all.

# # #



THE WHITE HOUSE  
WASHINGTON

*Disc with  
defunct  
abuse*

Date: May 20, 1977

MEMORANDUM

FOR ACTION:

Midge Costanza *AC* Jack Watson *AC*  
Stu Eizenstat *AC*  
Hamilton Jordan *lower - recommend*  
Bob Lipshutz  
Frank Moore *AC*  
Jody Powell

FOR INFORMATION:

*recommends lipshutz authorizes exceptions*

FROM: Rick Hutcheson, Staff Secretary

SUBJECT:

Hugh Carter memo re: Georgia Archives and report on  
Presidential Library and Paperwork

YOUR RESPONSE MUST BE DELIVERED  
TO THE STAFF SECRETARY BY:

TIME: 9 a.m.

DAY: Tuesday

DATE: May 24, 1977

ACTION REQUESTED:

☒ Your comments

Other:

STAFF RESPONSE:

☐ I concur.

☐ No comment.

Please note other comments below:

*Hold for  
Lipshutz  
he wishes to  
review  
thoroughly*

PLEASE ATTACH THIS COPY TO MATERIAL SUBMITTED.

If you have any questions or if you anticipate a delay in submitting the required



THE WHITE HOUSE  
WASHINGTON  
July 25, 1977

Bob Lipshutz  
Hugh Carter

The attached was returned in  
the President's outbox. It is  
forwarded to you for your  
information.

Rick Hutcheson

RE: REPORT OF COL. DUNN ON  
PRESIDENTIAL LIBRARY AND  
PAPERWORK



*Sounds good J*

## THE WHITE HOUSE

WASHINGTON

May 20, 1977

## MEMORANDUM FOR THE PRESIDENT

FROM:

HUGH CARTER *HC*

SUBJECT:

Report of Colonel John Dunn on Presidential Library and Paperwork

Colonel Dunn's report comprises five parts on separate subjects. We have reviewed all, both internally and with outside Government agencies concerned. While the report is adequate for what it contains, we are concerned that it may be somewhat over simplified, especially considering the complexity and number of a President's papers. Bob Lipshutz and I are working together to implement a thorough program on the library and paperwork. Subsequent reports will be coming to you.

1. PRESIDENTIAL LIBRARY: Colonel Dunn had eight recommendations, all of which have the concurrence of the National Archives, WHCA and White House staff offices involved.

ACTION TAKEN: All recommendations have been or are being implemented, as described below.

A. Photographs

1. Limit photographs (contact sheets) to 35,000 per year. We are in fact well below that rate now and are producing pictures at approximately one half the rate of that in the Ford Administration.
2. Identify photographs as made
3. Give priority to recording events (vs. people)

B. Government Printing Office Publications

1. Limit copies to one of each (vs. 2 in past). National Archives agrees that one copy is sufficient for the Presidential Library.

**Electrostatic Copy Made  
for Preservation Purposes**

C. Video Tape

1. WHCA to discontinue depositing video tapes with National Archives. National Archives receives tapes of significant news events from ABC, CBS and NBC. WHCA will discontinue supplying tapes of events already provided by networks.
2. WHCA and Navy Photographic Center develop a system to capture motion picture film from video tape. This is being accomplished by National Archives.

D. Diary

1. Assign responsibility for securing more complete record. One individual on Scheduling Office staff, previously with the National Archives, has the responsibility as a primary duty.

E. Computer File (for correspondence in Central Files)

1. Discontinue use for record keeping purposes. This has been done, but computer terminal may be used for other tracking purposes.

F. Presidential Referral Mail (to Agencies)

1. Discontinue copying referral mail. This has been implemented, except for individual special referrals (less than 1% of total).

G. Staffing of Central Files

1. Reduce staff by four by attrition. This will be accomplished faster than by attrition by transferring some personnel to Correspondence.

H. Disposal of Presidential Records (Bulk Mail)

1. Destroy bulk mail after limited retention period. National Archives has inspected this mail and has no archival interest in it except possibly a small sample.

National Archives representatives based in EOB will assist in the screening and compilation of documents for inclusion in the Carter Library.



2. WHITE HOUSE OFFICE PAPERS - Memorandum sets forth recommended guidelines governing White House staff retention of papers.

ACTION TAKEN: Bob Lipshutz will help handle this. In addition we will involve other staff members. Final procedures will be submitted to you for approval.

3. DISPOSITION OF PRESIDENTIAL PAPERS - Memorandum describes activities of Public Documents Commission regarding ownership of Presidential documents. Memorandum recommends approval of anticipated legislation making Presidential documents public property after a period of limited access.

ACTION TAKEN: Bob Lipshutz's office is handling this.

4. OVERSIGHT COMMITTEE - Memorandum recommends that the President veto legislation that may create an Oversight Committee under the Administrative Rulemaking Reform Act of 1977.

This Committee would have the right to review and reject regulations developed by Agencies pursuant to legislation already passed.

ACTION TAKEN: Review with OMB confirmed that Administration's position is against this legislation primarily due to question of constitutionality of such a "veto" prerogative by Congress. OMB will keep you apprised of progress and make final recommendations as necessary.

5. NATIONAL RECORDS MANAGEMENT EFFORT - Memorandum recommends the establishment of a separate National Records Management Office, probably under OMB, to assume certain responsibilities currently held by the National Archives and Records Service (GSA).

A second memorandum commends the Commission on Federal Paperwork and recommends that the transfer of one or two key members to the "Federal Records Management Office" after expiration of Commission in October 1977.

ACTION TAKEN: OMB has reviewed and recommends not to take any immediate action on these specific recommendations, but rather to let OMB incorporate them into their overall review of the subject as part of the President's Reorganization project.



THE WHITE HOUSE  
WASHINGTON

ACTION	FYI		
		MONDALE	ENROLLED BILL
		COSTANZA	AGENCY REPORT
		EIZENSTAT	CAB DECISION
		JORDAN	EXECUTIVE ORDER
		LIPSHUTZ	Comments due to
		MOORE	Carp/Huron within
		POWELL	48 hours; due to
		WATSON	Staff Secretary
			next day

<input checked="" type="checkbox"/>	FOR STAFFING
<input type="checkbox"/>	FOR INFORMATION
<input type="checkbox"/>	FROM PRESIDENT'S OUTBOX
<input type="checkbox"/>	LOG IN/TO PRESIDENT TODAY
<input type="checkbox"/>	IMMEDIATE TURNAROUND

	ARAGON		KRAFT
	BOURNE		LANCE
	BRZEZINSKI		LINDER
	BUTLER		MITCHELL
	CARP		POSTON
	H. CARTER		PRESS
	CLOUGH		B. RAINWATER
	FALLOWS		SCHLESINGER
	FIRST LADY		SCHNEIDERS
	GAMMILL		SCHULTZE
	HARDEN		SIEGEL
	HOYT		SMITH
	HUTCHESON		STRAUSS
	JAGODA		WELLS
	KING		VOORDE

THE WHITE HOUSE

WASHINGTON

May 20, 1977

MEMORANDUM FOR THE PRESIDENT

FROM: HUGH CARTER *HC*  
SUBJECT: Georgia Archives

Colonel Dunn recommends that the Director of the Georgia Archives be advised that all your files on deposit with the Archives are closed except the Governor's papers previously opened.

He further recommends that you authorize one or more persons to make exceptions.

Approve\* \_\_\_\_\_

Disapprove \_\_\_\_\_

\*Indicate names of persons authorized to make exceptions

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Date: May 20, 1977

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**DAY:** Tuesday

**DATE:** May 24, 1977

**ACTION REQUESTED:**

☒ Your comments

Other:

**STAFF RESPONSE:**

☐ I concur.

*Please note other comments below:*

☒ No comment.

**PLEASE ATTACH THIS COPY TO MATERIAL SUBMITTED.**

If you have any questions or if you anticipate a delay in submitting the required material, please telephone the Staff Secretary immediately. (Telephone, 7052)



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Recommend Lipshutz be person to authorize  
exception

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B. Government Printing Office Publications

1. Limit copies to one of each (vs. 2 in past). National Archives agrees that one copy is sufficient for the Presidential Library.



C. Video Tape

1. WHCA to discontinue depositing video tapes with National Archives. National Archives receives tapes of significant news events from ABC, CBS and NBC. WHCA will discontinue supplying tapes of events already provided by networks.
2. WHCA and Navy Photographic Center develop a system to capture motion picture film from video tape. This is being accomplished by National Archives.

D. Diary

1. Assign responsibility for securing more complete record. One individual on Scheduling Office staff, previously with the National Archives, has the responsibility as a primary duty.

E. Computer File (for correspondence in Central Files)

1. Discontinue use for record keeping purposes. This has been done, but computer terminal may be used for other tracking purposes.

F. Presidential Referral Mail (to Agencies)

1. Discontinue copying referral mail. This has been implemented, except for individual special referrals (less than 1% of total).

G. Staffing of Central Files

1. Reduce staff by four by attrition. This will be accomplished faster than by attrition by transferring some personnel to Correspondence.

H. Disposal of Presidential Records (Bulk Mail)

1. Destroy bulk mail after limited retention period. National Archives has inspected this mail and has no archival interest in it except possibly a small sample.

National Archives representatives based in EOB will assist in the screening and compilation of documents for inclusion in the Carter Library.

REPORT OF COLONEL JOHN DUNN ON  
PRESIDENTIAL LIBRARY AND PAPERWORK

1. PRESIDENTIAL LIBRARY
2. WHITE HOUSE OFFICE PAPERS
3. DISPOSITION OF PRESIDENTIAL PAPERS
4. OVERSIGHT COMMITTEE
5. NATIONAL RECORDS MANAGEMENT EFFORT



MEMORANDUM

THE WHITE HOUSE

WASHINGTON

PRESIDENTIAL LIBRARY

Enclosed paper gives a complete background of establishment, holdings, operation and costs of Presidential Libraries.

Like many other governmental activities, there is a proliferation of papers that continue to increase the cost and effort to operate these activities.

Recommend you consider the following actions as a first step in eliminating the excesses ---

A. Photographs --

There are 528,435 photographs in the Johnson Library. The next largest number is 112,822 in the Roosevelt Library and there are 67,934 in the Truman Library. While history cannot be dictated by numbers, it appears that 100 to 125 thousand photographs would amply document a four year term of an Administration.

Another Problem Many photographs of past administrations were not identified and are of no use and emphasis should be placed on photographing events.



## THE WHITE HOUSE

WASHINGTON

Recommend

a. Notify the White House Photographic Office to pace their photographic effort so that:

- (1) The number of photographs prepared for inclusion in the Archives should not exceed 35,000 each year.
- (2) Photographs will be identified at the time they are made.
- (3) Give priority to a photographic record of events.

B. Government Printing Office Publications

A law required the Government Printing Office to set aside two copies of every government publication for inclusion in the Presidential Library. Based on current rates of accumulation, over 1300 cubic feet will accumulate during a four year term.

In addition to printing, supplies and storage costs, it takes years of expensive labor to prepare the material for use in a Presidential Archives.

Recommendation --

The Government Printing Office be advised to discontinue accumulating one set of publication and the second set be reduced to that deemed critical by the Office of Presidential Libraries.

THE WHITE HOUSE  
WASHINGTONC. VIDEO TAPE

During the Ford Administration 879 video tapes were accumulated for deposit in the Ford Presidential Library - some tapes contain only football games.

Cost of blank tapes at this rate of accumulation is \$278,203 for a four year term.

Problems

(1) Video tapes do not have Archival quality. The emulsion wears off and the images fade with use.

(2) There are no facilities in the Presidential libraries to use 2" video tapes without purchasing a 1/4 million dollar machine. The cost to convert to an archival usable form by the government is \$65,925 and outside the government, over one half million dollars. One Library has converted from 2" to 3/4" tapes, placed them on Cassetts which makes them useful while they fade away.

All the information recorded on the video tapes by White House Communications Agency is recorded on motion picture film by the Navy Photographic Center except TV news of Presidential Activities. Most of these latter activities are more fully covered by the Navy Photographic Center. The only exception is the "Fireside Chat"

Recommendations

That WHCA discontinue depositing video tapes with the National Archives for inclusion in the Presidential Library.

This does not apply to temporary storage of material on video tape needed as reference material by the White House Staff for current operations.



MEMORANDUM

THE WHITE HOUSE

WASHINGTON

Recommendations (cont.)

This will save \$278,203 during the current term.

Also, that Navy Photographic Center and White House Communications Agency develop a system to capture the motion picture film from video tapes. This can be done within the current state of the art.

Results: Lower but acceptable quality of film

Savings of personnel space, travel and per diem expenses.

These two agencies must work closely together. For example the fireside chat is not recorded on motion picture film.

D. Diary

The log of Presidential activity is a valuable historical document and is an invaluable reference document for the Staff. The keeper does not have access to total data to compile the document, especially Presidential activity away from Washington.

Recommendation

Assignment of responsibility for securing data needed for a more complete record.



## THE WHITE HOUSE

WASHINGTON

E. Computer File

There are no substantive reasons to continue the Computer operation.

Recommendation

Notify Mr. William F. Matthews to discontinue use of the computer for record keeping purposes.

F. Presidential Referral Mail

Copies of Presidential correspondence referred to Departments and Agencies for direct reply are made and filed in the Central Files. Each letter shows date and agency to which referred.

729,160 is average number of letters referred annually over the past eight years. Letters average two pages.

Estimated number during Carter Administration --- 1,000,000,  
(past two week average projected for a 12 month period is 1.56 Mil)

Implications

8,000,000 pages will accumulate for Presidential Library each four years.

Cost for copying - \$117,784

Personnel required to copy and file 3 = \$130,000.00

THE WHITE HOUSE

WASHINGTON

There are occasional calls for reference/copies/ used to show letter was referred and date.

Other cost = 1. Larger Presidential Library

2. \$4.00 a square foot per year in perpetuity.

Recommendation

Notify Mr. Frank Matthews to discontinue practice of copying and filing Presidential correspondence referred to Agencies for reply.



MEMORANDUM

THE WHITE HOUSE

WASHINGTON

G. Staffing of Central Files

Mr. Frank Matthews and his staff should be commended for an outstanding operation. His staffing has continually declined since 1970 due primarily to seeking improved and more efficient methods of operation. SEE Enclosure.

A further reduction of four is recommended by attrition. This is possible due to eliminating computer file and copying of referred correspondence.



MEMORANDUM

THE WHITE HOUSE

WASHINGTON

H. Disposal of Presidential Records

a. There are approximately 182 cubic feet of Transition B Bulk Mail at the Washington National Records Center. These records have no archival value.

b. There will accumulate during your first term approximately:

<u>Cubic Feet</u>	<u>File Description</u>	<u>Recommended Retention Period</u>
800	Correspondence acknowledged by card	1 year
500	Children's letters acknowledged by card	1 year
2,000	Unacknowledged correspondence including: prolific writers, form and duplicated letters - clippings.	2 months
300	Greetings - Holiday, birthday, illness	1 year

This material is placed in 1 cubic foot boxes in chronological order.

It has no archival value and would be terribly costly to place in a usable arrangement in a Presidential Library.

Recommendations:

a. Mr. James B. Rhoads, Archivist of the United States be notified that approximately 182 cubic feet of bulk mail records now stored at Washington National Records Center be destroyed rather than stored for future inclusion in a Presidential Library.

b. Mr. Frank Matthews, Central Files, be notified to dispose of files listed in paragraph b. in accordance with indicated retention period.

*For The President*

CARTER PRESIDENTIAL HISTORICAL MATERIALS

National Archives and Records Service  
General Services Administration  
March 16, 1977

ENC 1 7



## CARTER PRESIDENTIAL HISTORICAL MATERIALS

### Introduction

Early in his administration, President Carter should begin to consider plans for eventual disposition of his Presidential historical materials. This paper outlines the history and current status of Presidential papers, the option for eventual deposit in a Presidential library, and services that should be performed by archivists working in the White House complex.

### Decision

The National Archives and Records Service recommends that President Carter approve the concept of depositing his Presidential historical materials in a Presidential library established for them. The following actions should be taken early in the Carter administration in support of this decision:

1. The President should receive and consider alternative proposals by interested groups in the State of Georgia for development of suitable library facilities. An early decision should be made concerning arrangements for a library structure to permit timely planning and construction and to avoid damaging local competition.
2. The President should approve assignment of a small staff of National Archives and Records Service personnel in the White House complex to help assure that a full record of the administration is organized and preserved and to coordinate planning for a Presidential library.

*I don't see the need  
for the work.  
John Dunn*



## PRESIDENTIAL LIBRARIES ACT

The Presidential Libraries Act (44 U.S.C. 2107-8) authorizes the Administrator of General Services to

- accept for deposit the papers and other historical materials of a President or former President of the United States, together with the papers of other persons relating to or contemporary with him.
- accept and take title on behalf of the United States to any land, buildings, and equipment offered as a gift for the purposes of establishing a Presidential library.
- enter into agreements with any state, university, institute, or foundation to use as a Presidential archival depository land, buildings, and equipment made available without transfer of title.
- maintain, operate, and protect such land, buildings, and equipment as a Presidential archival depository, part of the national archival system.
- open to the public exhibit rooms or museum space in a Presidential archival depository.
- provide reasonable office space in a Presidential archival depository for the personal use of the former President.

The Presidential Libraries Act permits the Government to preserve Presidential historical materials and to make them available for research and educational use, irrespective of questions concerning their ownership.



## OWNERSHIP OF PRESIDENTIAL PAPERS

While Presidential papers traditionally have been considered private property of the President, they have also been recognized as a form of property in which the Federal Government has a legitimate interest.

--Presidential historical materials form an irreplaceable part of our nation's historical heritage.

--They include classified documents and sensitive materials whose protection is essential to the nation's security.

Ownership and control of Presidential papers are now the subjects of active public debate.

--The status of Presidential materials recently has received wide attention in the news media.

--The original agreement concerning the Nixon tapes and papers caused public outcry and precipitated passage of the Presidential Recordings and Materials Preservation Act, which required GSA to take custody and control of the Nixon papers. The law is now the subject of a suit before the Supreme Court.

--The Public Documents Commission, established under Title II of the Presidential Recordings and Materials Preservation Act, has studied and held hearings on control, disposition, and preservation of records and documents of Federal officials, including the President. The Commission's recommendations, due at the end of this month, may affect the future status of Presidential papers.

The Presidential library system evolved as a workable compromise between private ownership of Presidential papers and the legitimate interest of the public and the Federal Government in them. The current debate over ownership and control of Presidential papers tends to confirm the system's value. Without regard to their ownership, Presidential papers may be deposited in a Presidential archival depository established for them. While the Government receives or retains title to the papers, Presidential library facilities, which are donated to the Government, are available to the public in a location the President himself chooses.



## PAPERS OF PREVIOUS PRESIDENTS

Papers of previous Presidents are located in various depositories including the Library of Congress, Presidential libraries, and institutions outside the Federal Government.

- Early Presidents removed their Presidential papers as private property; their heirs in some cases donated or sold the papers to the United States. The Library of Congress has 23 collections of Presidential papers. Other collections are in non-Federal repositories.
- Modern Presidents from Herbert Hoover to Lyndon Johnson, acting pursuant to applicable law, have deposited their papers with the National Archives for administration in Presidential libraries. In each case, however, the final transfer of title to the United States was not completed until after the death of the President, by action of a last will or by executors.
- Richard Nixon's Presidential materials are in custody of the U.S. Government as a result of Congressional enactment of the Presidential Recordings and Materials Preservation Act. Former President Nixon is currently challenging the constitutionality of the act in the Supreme Court.
- In December 1976, President Ford donated his Presidential papers to the Government for preservation in a Presidential archival depository in the State of Michigan. He restricted access to portions of these materials for a period not to exceed 13 years (excepting statutory and Executive order requirements). With these provisions, he became the first President to donate outright his materials to the Government while still in office and to prescribe such a short period of restriction.



## COST

The Presidential Libraries Act gives the Government authority to accept buildings or enter into agreements for their use as Presidential libraries, not the authority to construct them.

--To provide suitable buildings for Presidential libraries, previous Presidents have turned to private non-profit organizations or to state and local governmental units.

--Under the Presidential Libraries Act, Presidential libraries represent valuable gifts to the American people that have become popular assets to their communities.

--Because Presidential libraries are located throughout the nation, their scholarly resources and museum and education facilities are widely available to the American public.

The cost to the Government of maintaining Presidential papers must be met whether they are housed in National Archives facilities in the Washington area or in a Presidential library elsewhere.

--Presidential files are complex and include security-classified materials as well as other sensitive papers the disclosure of which would be an invasion of the President's, his family's, and associates' personal privacy. Professional staff attention is necessary to preserve and protect, declassify, and process these materials.

--The public demands access to the historical record contained in the President's papers as quickly as possible after the end of his term in office. A Presidential archival depository must have sufficient staff to assure prompt processing of the papers and adequate reference assistance.

--Presidential historical materials include audiovisual materials and three-dimensional objects that also must be preserved and made available as they are increasingly used in depicting recent American history.

--Currently, the average annual program expenditure for a Presidential library is approximately \$500,000, while the payment to the Federal Buildings Fund for maintenance of the building is approximately \$400,000. The entire annual cost of the Presidential library system is \$5.7 million, less than 10 percent of the funding appropriated for the National Archives and Records Service.



## A PRESIDENTIAL LIBRARY AND THE UNIVERSITY

Modern Presidential libraries may be associated successfully with a university by being located on campus or nearby. Such an arrangement is desirable both for the library and for the university. The most recent Presidential archival depositories are located or being planned on university campuses.

- The Johnson Library was constructed by the University of Texas on its Austin campus. Through an agreement between the University of Texas system and the United States Government, the building and land remain university property. Federal employees staff, operate, maintain, and protect the building.
- The Kennedy Library is being constructed by the John F. Kennedy Library Corporation on the University of Massachusetts Columbia Point campus. Through agreements between the Kennedy Library Corporation, the University of Massachusetts and the United States Government, the building and land will be deeded to the United States.
- The Ford Library, to be established in Michigan, will consist of two structures. The University of Michigan will construct a research facility on one of its Ann Arbor campuses, which it will make available to the Government for use as a Presidential archival depository. A community organization will provide the Government a museum facility in or near Grand Rapids, Michigan.



## MUSEUM

Public exhibit rooms or museum space for display of items relating to a President and his Presidency have been a traditional and prominent part of each Presidential library administered by the National Archives and Records Service under provisions of the Presidential Libraries Act.

- Exhibit rooms and museum space in the Hoover, Roosevelt, Truman, Eisenhower, and Johnson Presidential libraries are located in or adjacent to the libraries' research facilities. This arrangement has been successful in each case. The planned Kennedy Library Building also will include both research and museum facilities.
- The planned Ford Library museum and archival facilities will be located in separate communities. This as yet untried arrangement may prove difficult and costly to administer.
- Depending on the President's wishes, an exhibit and educational program would be appropriate for a Carter Presidential library.

## ARCHIVAL STAFF IN THE WHITE HOUSE COMPLEX

Depending on President Carter's wishes, National Archives personnel might be assigned to the White House complex to undertake some or all of the following projects in support of a future Presidential library:

### 1. Within the White House

- Develop briefings and circulars, supplemented as appropriate by personal contacts, to assure that White House staff understand the importance of preserving Presidential papers.
- Establish check-out procedures so that departing staff leave White House files in good order.
- Conduct "exit interviews" of departing officials to identify the scope and content of their White House roles to aid future study of the administration.
- Provide continuing liaison to White House Central Files, the Staff Secretary's office, the White House Gift Unit, and units creating audiovisual documentation of the President.

### 2. Outside the White House

- Arrange for transfer and courtesy storage in National Archives facilities of non-current Presidential materials; perform reference, preservation, and description activities on these materials as needed.
- Monitor creation, life, and termination of Presidential commissions, task forces, and advisory boards to assure that each follows good record-keeping practices and that its permanently valuable records are preserved.
- Acquire current publications relating to the administration as the core of a reference collection in a future Presidential library.

### 3. Preparation for a future archival depository

- Assist in evaluating proposed arrangements and locations for a future Presidential library.
- Assist in development of necessary legislative proposals for a Presidential library.
- Make long-range plans for transfer of Presidential materials to a permanent archival facility.



3. (continued)

- Formulate a program for solicitation of personal papers relating to the Carter administration that may have permanent historical value.
- Plan for the conduct of an oral history program to be undertaken at a later time.

## STEPS IN THE ESTABLISHMENT OF A PRESIDENTIAL LIBRARY

The Presidential Libraries Act (44 U.S.C. 2107-8) permits the Administrator of General Services to accept on behalf of the United States or to enter into an agreement to use land, buildings, and equipment as a Presidential archival depository. The Administrator may not take title to the property or enter an agreement until he has submitted a report to Congress and observed a 60-day waiting period or received Congressional approval of his plan. His report must include

- a description of land, buildings, and equipment offered as a gift or made available for the use of a Presidential archival depository.
- a statement of terms of the proposed agreement, if any.
- a description of papers, documents, and other historical materials offered for deposit in the proposed Presidential library.
- an estimate of annual cost to the Government to operate the library.

A series of written exchanges forms the legal basis of the offer and the acceptance and provides documentation for the report to Congress. The series would normally include

- a letter offering to donate land and building or enter an agreement for use of property in lieu of transfer for the purpose of establishing a Presidential library.
- a letter from the Administrator accepting the offer pending the 60-day waiting period.
- a letter from the President to the Administrator offering to donate his papers and other historical materials for the purpose of establishing a Presidential library. This letter should include or append a statement of terms and conditions affecting preservation and use of the materials, such as restrictions, and eventual disposition of literary property rights.
- a letter from the Administrator to the President accepting the offer.
- letters from the Administrator to the presiding officers of the Congress reporting on the offers as required.

After the 60-day waiting period or upon Congressional affirmation, the Administrator may proceed with actions to take title and begin operation.



APPENDIXES

Projected FY 1977 Presidential Libraries Operating  
Expenses

Comparative Statistical Summary of Presidential Libraries

Gerald R. Ford Historical Materials (Summary Estimates)

PROJECTED FY 1977 PRESIDENTIAL LIBRARIES  
OPERATING EXPENDITURES

	<u>Program Expenditures</u>	<u>Building Expenditures</u>	<u>Total</u>
Hoover	\$284,000	\$132,000	\$416,000
Roosevelt	\$454,000	\$312,500	\$766,500
Truman	\$482,000	\$384,500	\$866,500
Eisenhower	\$513,000	\$451,500	\$964,500
* Kennedy	\$614,000	*	\$614,000
Johnson	\$655,000	\$803,700	\$1,458,700
* Ford	\$380,000	**	\$450,000
		\$70,000	
* NIXON			

\*Located in temporary quarters in Waltham  
FARC. No costs are specifically identifiable  
for the library.

\*\*Located in temporary quarters provided  
by the University of Michigan at Ann Arbor.

\* NO OPERATIONAL LIBRARY



FOR MR CARTER

COMPARATIVE STATISTICAL SUMMARY OF PRESIDENTIAL LIBRARIES

FISCAL YEAR ENDING JUNE 30, 1976

	HOOVER	ROOSEVELT	TRUMAN	EISENHOWER	KENNEDY	JOHNSON
<u>Size of Building</u>						
Gross sq. ft.	28,461	53,474	80,550	83,627 <sup>2/</sup>	---	150,000
Net Usable ft.	25,751	42,545	55,330	70,694 <sup>3/</sup>	9,000	103,000
<u>Site</u>						
Land Area (acres)	33 <sup>1/</sup>	16	13	13.4	10	14
<u>Holdings</u>						
Manuscript on Paper (pgs.)	5,262,106	21,937,021	11,904,000	17,927,714	20,594,775	* 34,077,737
Manuscript on Microfilm (pgs.)	---	913,834	---	84,500	2,511,200	412 6,450,131
Photographs	12,694	112,822	67,934	88,680	65,900	528,435
Motion Picture Film (ft.)	127,774	284,253	249,586	589,930	4,426,881	691,347
Sound Recordings (discs & tapes)	697	4,782	2,411	2,366	2,961	8,554
Oral History Transcripts (pgs.)	9,478	939	19,901	16,574	25,296	17,560
Museum Objects	4,013	21,855	13,102	17,728	12,804	35,810
Books	21,392	35,615	43,428	24,985	22,051	12,378
Other Printed Items	21,284	60,594	59,416	23,162	21,195	16,820
<u>Reference Services (FY 1976)</u>						
Researcher Visits	754	1,770	1,299	625	728	1,055
Items Furnished	8,060	15,159	33,045	8,189	18,606	9,199
Reproductions Furnished	21,728	114,780	74,044	84,410	35,269	50,258
<u>Museum Visitors (FY 1976)</u>	97,342	213,766	351,210	199,099	---	683,810
<u>Cost of Operation (FY 1976)</u>						
Appropriated Funds	\$277,000	\$485,100	\$415,000	\$457,000	\$570,000	\$655,000
Trust Fund	\$111,664	\$189,845	\$422,921	\$244,422	\$ 13,357	\$170,369
Positions Authorized	31	29	36	41	31	42
(as of June 30, 1976)						

\* Recommendations submitted will reduce the 34 mil to half

- 1/ Hoover Park now administered by National Park Service,
- 2/ Library Building, 55,000; Museum Building, 28,677.
- 3/ Library Building, 44,784; Museum Building, 25,910.



*11.3 = 3.00 sheets*

GERALD R. FORD  
HISTORICAL MATERIALS

Summary Estimates

*Two year accumulation*

	<u>Number of Items</u>	<u>Cubic Feet</u>
<u>PAPERS</u>		
Congressional		
NARS		140
Bentley		630*
Vice-Presidential		160
Presidential		
Non-Classified		6,792
Classified in vault		276
SUBTOTAL		7,998
<u>PUBLISHED AND PRINTED MATERIALS</u>		
Congressional		166 <i>441 844</i>
GPO	<i>3.9 mil PAGES IN 444</i>	<i>641 - 1300 - 9600</i>
Gift Books	1,825	73
Acquired by purchase		3
SUBTOTAL		883
<u>A-V MATERIALS</u>		
Congressional		23*
Presidential		
Still Photographs	<i>2 yrs</i>	188** <i>REDUCED</i>
Motion Picture Film		255**
Video Tapes		220**
Audio Tapes		128**
Campaign Media		126**
SUBTOTAL	<i>4.3 mil FT</i>	940
<u>MUSEUM OBJECTS</u>		
Congressional		106 <i>NONE</i>
Vice-Presidential		120
Presidential		
Foreign		330
Domestic	<i>Gifts returned</i>	770 <i>OUT</i>
Bicentennial		360
SUBTOTAL		1,685
TOTAL		<u>11,507</u>

\*Located at Bentley Historical Library, University of Michigan

\*\*Located at National Archives and Records Service, Washington, D.C.



GERALD R. FORD  
HISTORICAL MATERIALS

Summary Estimates

	<u>Number of Items</u>	<u>Cubic Feet</u>
<u>PAPERS</u>		
Congressional		
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Vice-Presidential		160
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Classified in vault		<u>276</u>
SUBTOTAL		7,998
<u>PUBLISHED AND PRINTED MATERIALS</u>		
Congressional		166
GPO		<u>641</u> ✓
Gift Books	1,825	73
Acquired by purchase		<u>3</u>
SUBTOTAL		883
<u>A-V MATERIALS</u>		
Congressional		23*
Presidential		
Still Photographs		<u>188**</u>
Motion Picture Film		255**
Video Tapes	(879)	<u>220**</u>
Audio Tapes		128**
Campaign Media		<u>126**</u>
SUBTOTAL		940
<u>MUSEUM OBJECTS</u>		
Congressional		106
Vice-Presidential		120
Presidential		
Foreign		330
Domestic		<u>770</u>
Bicentennial		<u>360</u>
SUBTOTAL		<u>1,686</u>
	TOTAL	<u>11,507</u>

\*Located at Bentley Historical Library, University of Michigan

\*\*Located at National Archives and Records Service, Washington, D.C.

✓✓ Seven Colleges in Atlanta and Ga Southwestern College  
are also listed in the summary of historical materials by General and Special Publications.

MEMORANDUM

THE WHITE HOUSE

WASHINGTON

2

Memorandum for: The President

From: John Dunn

Subject: White House Office Papers.

Enclosed memorandum sets forth general policies concerning White House Office papers.

The policies enunciated represent a compromise between President Ford who did not permit a staff member to keep copies of any recommendations made to the President and President Nixon who was quite liberal in this regard.

Detailed procedures can be issued later, however, these general provisions need to be issued now.



MEMORANDUM

THE WHITE HOUSE

WASHINGTON

DRAFT PER JOHN DUNN

Subject: White House Office Papers

TO: White House Staff

FROM: Counsel to the President

1. By custom and tradition, all White House Office papers are regarded as the personal property of the President and subject to such control and disposition as he may determine. At the close of the Administration, the entire collection of papers now being created may be expected to be deposited in a Presidential library similar to the libraries that preserve the papers of past presidents.
2. Upon termination of employment with the staff, each staff member will turn over his entire files to Central Files with the exception of any personal files he might have maintained.
3. Personal files include: correspondence unrelated to any official duties performed by the staff member, personal books, pamphlets, periodicals, daily appointment books or log books, folders of newspaper or magazine clippings and copies of records of a personal nature relating to a person's employment or service. Personal files should not include any copies, drafts or working papers that relate to official business, or any documents or records, whether or not adopted, made or received in the course of official business.

MEMORANDUM

THE WHITE HOUSE

WASHINGTON

4. A staff member may make a copy or may retain an extra copy of a document which embodies original intellectual thought contributed by the staff member or any of his assistants, such as the product of research, the notes or drafts of speeches delivered by the staff member, and drafts of proposed legislation; and the copy of any other document written or signed by the staff member that is included in his or her chronological files, along with a duplicate of each related incoming letter or memorandum, may be retained if the original incoming document remains in the Presidential papers; provided, however, no copies may be retained of any documents which come within any of the following categories:

- (a) Material classified for reasons of the national security under Executive Order 11652;
- (b) Restricted data under the Atomic Energy Act of 1954, as amended;
- (c) Information supplied to the government under statutes which make the disclosure of such information a crime; or
- (d) Memoranda of all types written to the President; other documents that contain recommendations or advice made directly or indirectly to the President; proposed drafts of speeches or statements for the use of the President; schedule proposals to the President;



MEMORANDUM

THE WHITE HOUSE

WASHINGTON

briefing papers used in discussions with the President and records made of such discussions; minutes of meetings of the EPB, ERC, and similar cabinet-level organizations; personnel recommendations or evaluations, and the like.

- (e) No exceptions will be made for materials listed in paragraphs (a) through (c). Exceptions to instructions in paragraph (d) can be made with the express consent of the Counsel to the President.
- (f) The discretionary authority granted in (e) is expected to be exercised sparingly on a document by document basis and should never exceed a few documents.

MEMORANDUM

THE WHITE HOUSE

WASHINGTON

DISPOSITION OF PRESIDENTIAL PAPERS

3

A study commission was established by Senate Bill 4016 on December 19, 1974 to determine status of records of the President, Vice President, members of Congress and Federal Judges.

Commission consisted of:

Senate - 2	House - 2
State Dept. - 1	White House - 1
Justice - 1	Defense - 1
Library of Congress - 1	Archivist - 1
Chairman - Honorable Herbert Brownell	

General Conclusion # 1

- a. "Records accumulated in connection with official duties should be the property of the United States Government."
- b. The officeholder should have a specified and limited interval over access to his papers and records.
- c. Not retroactive

General Conclusion # 2

- a. Same as a. above.
- b. A group headed by former Attorney General Brownell thinks the Freedom of Information Act should apply rather than paragraph b. above.



MEMORANDUM

THE WHITE HOUSE

WASHINGTON

Recommendation

Approve legislation that reflects conclusion # 1. The Archivist wants all the papers -- even if we must wait awhile to get them.

Note -- We did this in Georgia 3 years ago without this expense and delay.

## General Conclusion

As a result of its study, the Commission realizes that the laws, regulations, and practices which currently govern the disposition of the records and papers of Federal officials have led to the preservation and availability of much significant documentary material. In addition, the Commission is agreed that the primary reasons for this preservation should be 1) to aid in the continuing operations of the government, 2) to provide evidence for the public accountability of elected and appointed officials, and 3) to make it possible for scholars to analyze, and reconstruct history.

In order to achieve these goals, the Commission believes that the records accumulated in connection with the official duties of the President, Vice President, Members of Congress, and Federal Judges should be the property of the United States Government. But, because the papers of the officials in the different branches of government vary as much as the mandated functions of the officials, the Commission feels that the papers need not, and indeed should not, be treated in exactly the same manner.

Thus, for example, a great deal of attention was given to the practical problems associated with collecting, cataloging, and housing the papers of all Members of Congress. While no one disputed the value to history of a small proportion of each of these collections, the Commission reluctantly concluded that the practical problems and costs inherent in handling the enormous mass of material probably outweighed the value of the individual papers. Thus, the Commission recommends incentives for the preservation of this material. For different reasons, the same conclusion has been reached for the papers of Federal judges.

inhibition?

SEE TOP OF NEXT PAGE TAB--



The Commission is not unmindful of the fact that Presidents and all other federal officials have a legitimate interest in preventing premature disclosure of documents of a sensitive nature. Accordingly, the Commission believes it is necessary to assure the officeholder an interval of control over access to his papers and records. Without such assurance, the self-protection which animates all persons, and especially those exposed to the uncertainties of political life, could lead to a limited record of activity. Naturally, however, any interval of control should be specified and limited.

Furthermore, it should be noted that the Commission's recommendations are wholly prospective and are not meant to apply to records and documents created prior to the adoption of any legislation which results from this report.

Extract: Thus, a number of Senators expressed the opinion that, as Senator Ervin put it, "when an official...makes records at the expense of taxpayers,... in equity and good conscience those records belong to the public."

*See enclosed document setting forth position of attorney General Brownell.*

# Document Guardians Split Over Ex-Presidents' Access

United Press International

After a year and a half of study, a special commission is proposing a law to establish that the papers a President generates belong to the people of the United States and are not his personal property.

But the Public Documents Commission, created by Congress in reaction to former President Richard Nixon's continuing effort to keep his White House tape recordings, has reached no agreement on whether a retiring Chief Executive should be permitted to restrict access to papers he generated.

As a result, Chairman Herbert Brownell Jr., Attorney General in the Eisenhower Administration, announced when the commission met Thursday to draft its March 31 report that he would submit a separate report to Congress and President Carter.

Under Brownell's plan, a citizen could use the Freedom of Information Act to demand and sue for instant access to many of the documents created by presidents and their aides, members of Congress and judges. Internal documents—memos from an official's staff, for example—would remain private.

The act now applies only to docu-

ments generated by government agencies.

Most of the panel's 17 government officials, members of Congress and historians argued that the Brownell proposal would result in the public learning less, not more.

Rejecting compromise overtures, Brownell said the division is "irreconcilable."

His opponents said his proposal would deter officials from committing controversial matters to paper. Said one member privately, "The paper shredders really would operate."

Lucius D. Battle, a former ambassador and State Department official, said he did not see how the White House could function if its records were subject to immediate public access.

Brownell argued, "Congress has created a Freedom of Information Act that has worked for 10 years. The time has come to extend it throughout government."

Both sides will recommend legislation declaring the papers of presidents public property, with only personal papers exempted.

The panel's draft report also treats papers of judges and members of Congress that way, but congressional members may resist that proposal. Presidents always have treated their papers as personal property.

NOTE: The archivist wants ALL the records even if we wait awhile to get them.



MEMORANDUM

THE WHITE HOUSE  
WASHINGTON

A

OVERSIGHT COMMITTEE

Senators Nunn, Byrd and Percy in the Regulatory Reform Act of 1977 provide for Oversight Committee review of agency/departments rules and regulations before they are published. This is listed as a solution to a major paperwork problem by the Commission on Federal Paperwork (Copy enclosed). This only adds another layer of Bureaucracy and will further delay program implementation/delivery of services to the people. What is needed is to remove layers of requirements, not add more and more.

Recommend that you veto any such legislation that should reach your office.

PROBLEM 5 VAGUE GOALS, OBJECTIVES, STANDARDS AND REQUIREMENTS, WHICH LEADS TO DEFENSIVE PAPERWORK AND REDTAPE

- SOLUTIONS
- CONGRESSIONAL OVERSIGHT OF LAWS, REGULATIONS AND OPERATIONS
  - NATIONAL OR REGIONAL STANDARDS
  - PERFORMANCE STANDARDS AND COMPLIANCE CRITERIA
  - AVOIDANCE OF PROCESS REPORTING; RELIANCE ON RESULTS REPORTING
  - FIXED POINTS OF ACCOUNTABILITY/RESPONSIBILITY

- - -

Illustrative Recommendations

- Recommend the Social Security Administration Central Office set nationally uniform standards in lieu of the present vague, and conflicting standards developed by multiple offices and agents
- Department of Labor should review the reporting requirements of the CETA program to eliminate any requirements that exceed the Congressional mandate for a "flexible and decentralized system of manpower programs"
- Department of Labor should develop criteria for "levels of effectiveness" against which State performance can be more readily assessed in the OSHA program



DO NOT REW...  
House  
5  
NATIONAL RECORDS MANAGEMENT EFFORT

Buried 2 levels below GSA

\$3.4 mil. effort

(2.4) Appropriated

(1. ) Reimbursable

Several of the important positions are occupied by historians who are ill-prepared to conduct a managerial program. Also supervised by historians.

There is a mix of cultural-managerial and service functions

The entire program including the agencies is marginal at best.

# *Proposed NAT'L Records mgmt effort.*

This proposal is predicated on the fact that excessive paperwork, red tape and delays can be eliminated even though no one has ever been able to do it before.

Proposed organization and a dedicated group of people working full time will provide a sound basis for Government service to reach the people in an efficient, economical and effective manner.

INCL 5



## SUGGESTED NATIONAL RECORDS MANAGEMENT EFFORT

1. Establish a separate National Records Management office that would be responsive to the President. (It is now under the Archivist of the U. S.--~~Dr. Rhodes--he would not object.~~) **DOES OBJECT**

**POLITICAL APPOINTEE BY ADMINISTRATOR GSA**

a. It could serve as a separate commission or be attached to the Office of Management and Budget (OMB).

b. In addition to current records management responsibilities, the office would also be responsible for:

(1) Phase-in and assumption of duties of the Commission on Federal Paperwork as the commission expires and,

(2) Monitor and take corrective actions in the delivery of services within the Government, but primarily at the ten regional offices in the United States where services usually flow to the people. See Enclosure 5 for organizational chart for records management.

*(B) OMB functions*

2. Staffing.

a. The National Records Management staff is 100 in the Washington area and 50 in the records offices of the regions. These figures are exclusive of the agency/department records management staffs.

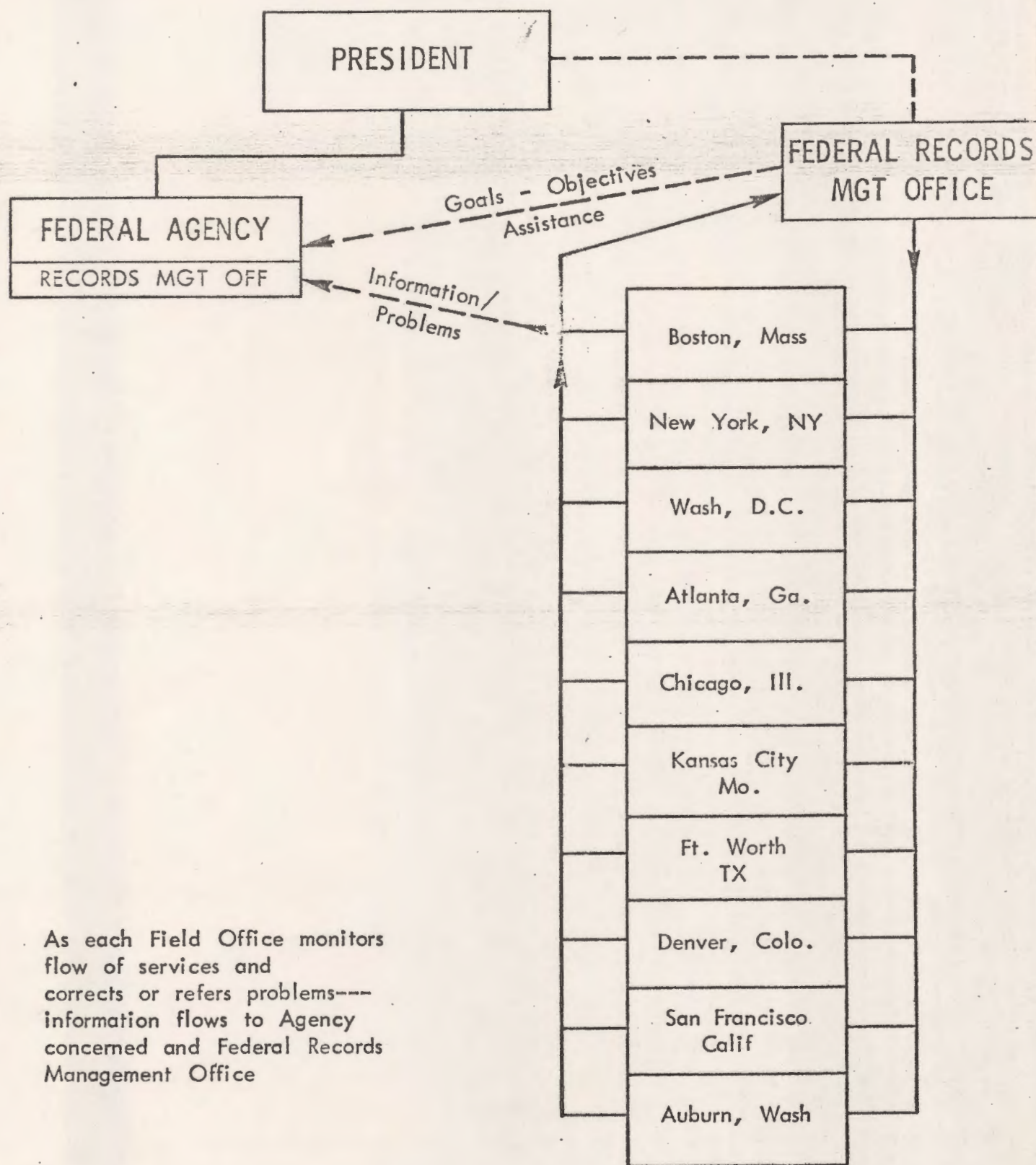
b. The agencies/departments will need to supplement their records management staff with management analysts and systems personnel from within the department. Likewise, the regional records offices will need some increased staff from departments/agencies in the area (management analysts--systems personnel--auditor).

c. The National Records Management staff will need a space for an outstanding records manager from industry and two or three personnel from the Commission on Paperwork Management. The full 100 staff may not be needed at the national level. The key to success is a strong agency/department staff.

*NOTE: The Federal Paperwork Commission plans to submit recommendations similar to those above.*



# ORGANIZATIONAL CHART FOR RECORDS MANAGEMENT



As each Field Office monitors flow of services and corrects or refers problems--- information flows to Agency concerned and Federal Records Management Office



Recommend that someone be assigned records  
management responsibilities within the White  
House

DO NOT RE AM  
white House

Dr. Ruth Thomas is an educator, a member of the Board of Regents of the Institute of Records Managers, a former consultant, Certified Records Manager, a former member of the National Records Management effort and currently Chief of Information Management for the Bureau of Immigration and Naturalization.

She is well respected by her colleagues in the Records Management profession. Her assessment of Records Management in the Federal Government is enclosed.



UNITED STATES GOVERNMENT

# Memorandum

TO : [REDACTED]

DATE: March 18, 1977

FROM : Ruth Thomas

SUBJECT: Records Management in the Federal Government

Your offer to consider my views on Records Management in the Federal Government is appreciated. It is particularly heartening to know that the new administration recognizes the importance and need to revitalize efforts in this area.

Probably the first concern, and by no means the most important, is the title Records Management. The title is not only limiting, but a misnomer in relation to what is going on in the field today. Actually we need a title similar to "Information Management." Such a title would describe the scope of our activities and would enhance public relations (if for no other reason than to change the visual imagery created by the title "Records Management").

The most important concern to Records Management professionals in the Federal Service is to impress upon Federal administrators, the Congress, and the Executive the importance and urgency of the paperwork problem of the Federal Government. We know that in industry the fourth largest expense is information management--following in this order (1) personnel expense, (2) materials, and (3) transportation. (Actually information management is approaching third place rapidly.) We also know that materials and transportation are lesser expenses in the Government than in industry; therefore, information management is surely the second largest expense in the Federal budget. We have only documented the expenditure of \$20 billion a year for Federal paperwork management, but most of us who are familiar with that documentation know that we see only the tip of the iceberg. Given the political climate in which we bureaucrats operate, it follows that the most expedient means to getting our message across is through the White House.

Next, it would be good to examine the current effort in this endeavor. Each agency has its own unique records management program--usually fragmented with various responsibilities in every conceivable component of the organization. And the records management program itself is usually considered a file and storage operation--regardless of what the functional



Buy U.S. Savings Bonds Regularly on the Payroll Savings Plan



March 18, 1977

statements show. To compound the woes of the Federal records manager, Records Management is considered to be the most expendable function of the organization and is therefore the first component hit with reductions in force and cut budgets. Further, when efforts are made (usually in response to some crisis) to upgrade records management, it is seldom approached as a systems effort but rather a patchwork attempt to allay the current brush fire.

The Records Management leadership role is lodged with the National Archives and Records Service under the General Services Administration--an unlikely alliance if ever there was one. It would be difficult to give a logical explanation for the placement of a management function in an organization whose major function is property management.

As if Federal records management problems were not insurmountable enough due to the magnitude of our paperwork, we find that the internal Federal Records Management leadership role has historically been subjugated to that of archival interests--this despite the fact that only 5 percent of the paperwork with which we are concerned is of archival or historical value. Nationwide the Federal Government has allocated approximately 150 positions to grapple with the internal Government leadership role associated with the second largest expense in the Federal budget and has placed the function in an organization, National Archives and Records Service, that devotes approximately 5 percent of its total budget to this endeavor, while devoting 69 percent of its budget to archival interests (FY 1977).

If we are ever to reverse trends in Federal paperwork management, we must come to grips with the root cause of the problem. It is my firm conviction that while most Federal Government administrators are well-intentioned, their management capability is mediocre at best. This is not due to either the intelligence or motivation of the individuals administrators, but rather to a set of circumstances that preclude their attaining high levels of achievement. Federal Government managers on the whole have come up through the Civil Service ranks and have been promoted, via the Peter Principle, to positions of incompetency. This because (1) they do not have the educational background required of management in today's highly technological work, (2) the training they have received is hit-and-miss, (3) they are



March 18, 1977

more often than not misplaced in relation to their experience and background, (4) they have little or no guidance, and (5) there is practically no penalty or discipline for those who cannot produce.

According to the charter of the Office of Management and Budget (OMB), this agency is to (1) "....aid the President to bring about more efficient and economical conduct of Government service, (2) .... promote ....administrative management, and advise the executive departments and agencies of the Government with respect to improved administrative organization and practice, and (3) keep the President informed of the progress of activities by agencies of the Government with respect to work proposed, work actually initiated, and work completed...." With this in mind, it is difficult to understand why internal Records Management, surely an administrative function, is in General Services Administration.

To the best of my knowledge, OMB has given scant attention to the improvement of management practices. Therefore, it appears that Records Management or Information Management would be the ideal vehicle for the President to use to launch a management improvement program across the board. And if the President were to decide to make an all-out effort to improve Government management practices, it would appear that he would have two logical choices for its structure--to develop a separate organization reporting directly to the White House or place all management functions together in OMB with reporting responsibility to the White House (keeping in mind that OMB now has responsibility for records management related to public reporting).

I think that it is of utmost importance to place all management and records management improvement functions together. If Records Management improvement is made a separate entity, it could operate optimally and still have no impact unless it had not only the backing of records managers but all administrators who are assigned policy-setting and decision-making responsibilities.

As for the structuring of Archives and Records Management-- I have no problem with the continued alliance if it were put into perspective--that is placing Archives in an adjunct role as it is found in the entire business world. Archives is a small (5 percent) interrelated part of Records Management and I would be opposed to its becoming a separate entity. We simply need to put the positions, finances, and backing in the order of the magnitude of the problem--otherwise neither



~~March 18, 1977~~  
March 18, 1977

Records Management nor Archives can flourish. Certainly, we can no longer afford the assignment of the leadership role of the second largest financial outlay in Federal Service (information management) to an organizational element whose personnel haven't the experience, background, or interest to deal effectively with the problem.

In the end, four influences must be brought to bear on the Federal paperwork problem--that of the agency records managers, the agency administrators, the organizational element responsible for management leadership, and the President and/or Congress.

We must revert to the original intent of the Federal Government--to provide service to the citizens of this country and to do so as effectively and at as little cost to the taxpayers as possible. There is no doubt in my mind that the public can be served and that it can be served far more efficiently at less expense than is now being done.

*L. Ruth Thomas*



MEMORANDUM

THE WHITE HOUSE

WASHINGTON

PAPERWORK MANAGEMENT COMMISSION

The Commission is doing an excellent job of solving as many major problems as possible while identifying problems areas and recommending solutions.

The savings have greatly exceeded the investment. It is a refreshing approach to the old method of "Study and Recommend".

The Commission expires on October 3, 1977.

The Commission has had unlimited funds and has been able to assemble a very distinguished group. Their problem identification and problem solutions would be substantially beyond the ability of the average government employee to understand and translate into action programs.

Recommend that one/two key members of the Commission be moved to the Federal Records Management Office and be given primary responsibility for getting the recommendations implemented.

REPORT OF COLONEL JOHN DUNN ON  
PRESIDENTIAL LIBRARY AND PAPERWORK

1. PRESIDENTIAL LIBRARY
2. WHITE HOUSE OFFICE PAPERS
3. DISPOSITION OF PRESIDENTIAL PAPERS
4. OVERSIGHT COMMITTEE
5. NATIONAL RECORDS MANAGEMENT EFFORT





MEMORANDUM

THE WHITE HOUSE

WASHINGTON

PRESIDENTIAL LIBRARY

Enclosed paper gives a complete background of establishment, holdings, operation and costs of Presidential Libraries.

Like many other governmental activities, there is a proliferation of papers that continue to increase the cost and effort to operate these activities.

Recommend you consider the following actions as a first step in eliminating the excesses ---

A. Photographs --

There are 528,435 photographs in the Johnson Library. The next largest number is 112,822 in the Roosevelt Library and there are 67,934 in the Truman Library. While history cannot be dictated by numbers, it appears that 100 to 125 thousand photographs would amply document a four year term of an Administration.

Another Problem Many photographs of past administrations were not identified and are of no use and emphasis should be placed on photographing events.



MEMORANDUM

THE WHITE HOUSE

WASHINGTON

Recommend

a. Notify the White House Photographic Office to pace their photographic effort so that:

- (1) The number of photographs prepared for inclusion in the Archives should not exceed 35,000 each year.
- (2) Photographs will be identified at the time they are made.
- (3) Give priority to a photographic record of events.

B. Government Printing Office Publications

A law required the Government Printing Office to set aside two copies of every government publication for inclusion in the Presidential Library. Based on current rates of accumulation, over 1300 cubic feet will accumulate during a four year term.

In addition to printing, supplies and storage costs, it takes years of expensive labor to prepare the material for use in a Presidential Archives.

Recommendation --

The Government Printing Office be advised to discontinue accumulating one set of publication and the second set be reduced to that deemed critical by the Office of Presidential Libraries.

MEMORANDUM

THE WHITE HOUSE  
WASHINGTON

C. VIDEO TAPE

During the Ford Administration 879 video tapes were accumulated for deposit in the Ford Presidential Library - some tapes contain only football games.

Cost of blank tapes at this rate of accumulation is \$278,203 for a four year term.

Problems

(1) Video tapes do not have Archival quality. The emulsion wears off and the images fade with use.

(2) There are no facilities in the Presidential libraries to use 2" video tapes without purchasing a 1/4 million dollar machine. The cost to convert to an archival usable form by the government is \$65,925 and outside the government, over one half million dollars. One Library has converted from 2" to 3/4" tapes, placed them on Cassetts which makes them useful while they fade away.

All the information recorded on the video tapes by White House Communications Agency is recorded on motion picture film by the Navy Photographic Center except TV news of Presidential Activities. Most of these latter activities are more fully covered by the Navy Photographic Center. The only exception is the "Fireside Chat"

Recommendations

That WHCA discontinue depositing video tapes with the National Archives for inclusion in the Presidential Library.

This does not apply to temporary storage of material on video tape needed as reference material by the White House Staff for current operations.



MEMORANDUM

THE WHITE HOUSE  
WASHINGTON

Recommendations (cont.)

This will save \$278,203 during the current term.

Also, that Navy Photographic Center and White House Communications Agency develop a system to capture the motion picture film from video tapes. This can be done within the current state of the art.

Results: Lower but acceptable quality of film

Savings of personnel space, travel and per diem expenses.

These two agencies must work closely together. For example the fireside chat is not recorded on motion picture film.

D. Diary

The log of Presidential activity is a valuable historical document and is an invaluable reference document for the Staff. The keeper does not have access to total data to compile the document, especially Presidential activity away from Washington.

Recommendation

Assignment of responsibility for securing data needed for a more complete record.

MEMORANDUM

THE WHITE HOUSE

WASHINGTON

E. Computer File

There are no substantive reasons to continue the  
Computer operation.

Recommendation

Notify Mr. William F. Matthews to discontinue use of the  
computer for record keeping purposes.

F. Presidential Referral Mail

Copies of Presidential correspondence referred to  
Departments and Agencies for direct reply are made and filed in  
the Central Files. Each letter shows date and agency to which  
referred.

729,160 is average number of letters referred annually over the  
past eight years. Letters average two pages.

Estimated number during Carter Administration --- 1,000,000,  
(past two week average projected for a 12 month period is 1.56 Mil)

Implications

8,000,000 pages will accumulate for Presidential Library each  
four years.

Cost for copying - \$117,784

Personnel required to copy and file 3 = \$130,000.00



MEMORANDUM

THE WHITE HOUSE

WASHINGTON

There are occasional calls for reference/copies/ used to show letter was referred and date.

Other cost = 1. Larger Presidential Library  
2. \$4.00 a square foot per year in perpetuity.

Recommendation

Notify Mr. Frank Matthews to discontinue practice of copying and filing Presidential correspondence referred to Agencies for reply.

MEMORANDUM

THE WHITE HOUSE

WASHINGTON

G. Staffing of Central Files

Mr. Frank Matthews and his staff should be commended for an outstanding operation. His staffing has continually declined since 1970 due primarily to seeking improved and more efficient methods of operation. SEE Enclosure.

A further reduction of four is recommended by attrition. This is possible due to eliminating computer file and copying of referred correspondence.



MEMORANDUM

THE WHITE HOUSE

WASHINGTON

H. Disposal of Presidential Records

a. There are approximately 182 cubic feet of Transition Bulk Mail at the Washington National Records Center. These records have no archival value.

b. There will accumulate during your first term approximately:

<u>Cubic Feet</u>	<u>File Description</u>	<u>Recommended Retention Period</u>
800	Correspondence acknowledged by card	1 year
500	Children's letters acknowledged by card	1 year
2,000	Unacknowledged correspondence including: prolific writers, form and duplicated letters - clippings	2 months
300	Greetings - Holiday, birthday, illness	1 year

This material is placed in 1 cubic foot boxes in chronological order.

It has no archival value and would be terribly costly to place in a usable arrangement in a Presidential Library.

Recommendations:

a. Mr. James B. Rhoads, Archivist of the United States be notified that approximately 182 cubic feet of bulk mail records now stored at Washington National Records Center be destroyed rather than stored for future inclusion in a Presidential Library.

b. Mr. Frank Matthews, Central Files, be notified to dispose of files listed in paragraph b. in accordance with indicated retention period.

FOR THE President

CARTER PRESIDENTIAL HISTORICAL MATERIALS

National Archives and Records Service  
General Services Administration  
March 16, 1977

ENC 1 7



## CARTER PRESIDENTIAL HISTORICAL MATERIALS

### Introduction

Early in his administration, President Carter should begin to consider plans for eventual disposition of his Presidential historical materials. This paper outlines the history and current status of Presidential papers, the option for eventual deposit in a Presidential library, and services that should be performed by archivists working in the White House complex.

### Decision

The National Archives and Records Service recommends that President Carter approve the concept of depositing his Presidential historical materials in a Presidential library established for them. The following actions should be taken early in the Carter administration in support of this decision:

1. The President should receive and consider alternative proposals by interested groups in the State of Georgia for development of suitable library facilities. An early decision should be made concerning arrangements for a library structure to permit timely planning and construction and to avoid damaging local competition.
2. The President should approve assignment of a small staff of National Archives and Records Service personnel in the White House complex to help assure that a full record of the administration is organized and preserved and to coordinate planning for a Presidential library.

*I don't see the need  
for the work.  
John D. ...*

## PRESIDENTIAL LIBRARIES ACT

The Presidential Libraries Act (44 U.S.C. 2107-8) authorizes the Administrator of General Services to

- accept for deposit the papers and other historical materials of a President or former President of the United States, together with the papers of other persons relating to or contemporary with him.
- accept and take title on behalf of the United States to any land, buildings, and equipment offered as a gift for the purposes of establishing a Presidential library.
- enter into agreements with any state, university, institute, or foundation to use as a Presidential archival depository land, buildings, and equipment made available without transfer of title.
- maintain, operate, and protect such land, buildings, and equipment as a Presidential archival depository, part of the national archival system.
- open to the public exhibit rooms or museum space in a Presidential archival depository.
- provide reasonable office space in a Presidential archival depository for the personal use of the former President.

The Presidential Libraries Act permits the Government to preserve Presidential historical materials and to make them available for research and educational use, irrespective of questions concerning their ownership.



## OWNERSHIP OF PRESIDENTIAL PAPERS

While Presidential papers traditionally have been considered private property of the President, they have also been recognized as a form of property in which the Federal Government has a legitimate interest.

- Presidential historical materials form an irreplaceable part of our nation's historical heritage.
- They include classified documents and sensitive materials whose protection is essential to the nation's security.

Ownership and control of Presidential papers are now the subjects of active public debate.

- The status of Presidential materials recently has received wide attention in the news media.
- The original agreement concerning the Nixon tapes and papers caused public outcry and precipitated passage of the Presidential Recordings and Materials Preservation Act, which required GSA to take custody and control of the Nixon papers. The law is now the subject of a suit before the Supreme Court.
- The Public Documents Commission, established under Title II of the Presidential Recordings and Materials Preservation Act, has studied and held hearings on control, disposition, and preservation of records and documents of Federal officials, including the President. The Commission's recommendations, due at the end of this month, may affect the future status of Presidential papers.

The Presidential library system evolved as a workable compromise between private ownership of Presidential papers and the legitimate interest of the public and the Federal Government in them. The current debate over ownership and control of Presidential papers tends to confirm the system's value. Without regard to their ownership, Presidential papers may be deposited in a Presidential archival depository established for them. While the Government receives or retains title to the papers, Presidential library facilities, which are donated to the Government, are available to the public in a location the President himself chooses.

## PAPERS OF PREVIOUS PRESIDENTS

Papers of previous Presidents are located in various depositories including the Library of Congress, Presidential libraries, and institutions outside the Federal Government.

- Early Presidents removed their Presidential papers as private property; their heirs in some cases donated or sold the papers to the United States. The Library of Congress has 23 collections of Presidential papers. Other collections are in non-Federal repositories.
- Modern Presidents from Herbert Hoover to Lyndon Johnson, acting pursuant to applicable law, have deposited their papers with the National Archives for administration in Presidential libraries. In each case, however, the final transfer of title to the United States was not completed until after the death of the President, by action of a last will or by executors.
- Richard Nixon's Presidential materials are in custody of the U.S. Government as a result of Congressional enactment of the Presidential Recordings and Materials Preservation Act. Former President Nixon is currently challenging the constitutionality of the act in the Supreme Court.
- In December 1976, President Ford donated his Presidential papers to the Government for preservation in a Presidential archival depository in the State of Michigan. He restricted access to portions of these materials for a period not to exceed 13 years (excepting statutory and Executive order requirements). With these provisions, he became the first President to donate outright his materials to the Government while still in office and to prescribe such a short period of restriction.



## COST

The Presidential Libraries Act gives the Government authority to accept buildings or enter into agreements for their use as Presidential libraries, not the authority to construct them.

- To provide suitable buildings for Presidential libraries, previous Presidents have turned to private non-profit organizations or to state and local governmental units.
- Under the Presidential Libraries Act, Presidential libraries represent valuable gifts to the American people that have become popular assets to their communities.
- Because Presidential libraries are located throughout the nation, their scholarly resources and museum and education facilities are widely available to the American public.

The cost to the Government of maintaining Presidential papers must be met whether they are housed in National Archives facilities in the Washington area or in a Presidential library elsewhere.

- Presidential files are complex and include security-classified materials as well as other sensitive papers the disclosure of which would be an invasion of the President's, his family's, and associates' personal privacy. Professional staff attention is necessary to preserve and protect, declassify, and process these materials.
- The public demands access to the historical record contained in the President's papers as quickly as possible after the end of his term in office. A Presidential archival depository must have sufficient staff to assure prompt processing of the papers and adequate reference assistance.
- Presidential historical materials include audiovisual materials and three-dimensional objects that also must be preserved and made available as they are increasingly used in depicting recent American history.
- Currently, the average annual program expenditure for a Presidential library is approximately \$500,000, while the payment to the Federal Buildings Fund for maintenance of the building is approximately \$400,000. The entire annual cost of the Presidential library system is \$5.7 million, less than 10 percent of the funding appropriated for the National Archives and Records Service.

## A PRESIDENTIAL LIBRARY AND THE UNIVERSITY

Modern Presidential libraries may be associated successfully with a university by being located on campus or nearby. Such an arrangement is desirable both for the library and for the university. The most recent Presidential archival depositories are located or being planned on university campuses.

- The Johnson Library was constructed by the University of Texas on its Austin campus. Through an agreement between the University of Texas system and the United States Government, the building and land remain university property. Federal employees staff, operate, maintain, and protect the building.
- The Kennedy Library is being constructed by the John F. Kennedy Library Corporation on the University of Massachusetts Columbia Point campus. Through agreements between the Kennedy Library Corporation, the University of Massachusetts and the United States Government, the building and land will be deeded to the United States.
- The Ford Library, to be established in Michigan, will consist of two structures. The University of Michigan will construct a research facility on one of its Ann Arbor campuses, which it will make available to the Government for use as a Presidential archival depository. A community organization will provide the Government a museum facility in or near Grand Rapids, Michigan.



## MUSEUM

Public exhibit rooms or museum space for display of items relating to a President and his Presidency have been a traditional and prominent part of each Presidential library administered by the National Archives and Records Service under provisions of the Presidential Libraries Act.

- Exhibit rooms and museum space in the Hoover, Roosevelt, Truman, Eisenhower, and Johnson Presidential libraries are located in or adjacent to the libraries' research facilities. This arrangement has been successful in each case. The planned Kennedy Library Building also will include both research and museum facilities.
- The planned Ford Library museum and archival facilities will be located in separate communities. This as yet untried arrangement may prove difficult and costly to administer.
- Depending on the President's wishes, an exhibit and educational program would be appropriate for a Carter Presidential library.

## ARCHIVAL STAFF IN THE WHITE HOUSE COMPLEX

Depending on President Carter's wishes, National Archives personnel might be assigned to the White House complex to undertake some or all of the following projects in support of a future Presidential library:

### 1. Within the White House

- Develop briefings and circulars, supplemented as appropriate by personal contacts, to assure that White House staff understand the importance of preserving Presidential papers.
- Establish check-out procedures so that departing staff leave White House files in good order.
- Conduct "exit interviews" of departing officials to identify the scope and content of their White House roles to aid future study of the administration.
- Provide continuing liaison to White House Central Files, the Staff Secretary's office, the White House Gift Unit, and units creating audiovisual documentation of the President.

### 2. Outside the White House

- Arrange for transfer and courtesy storage in National Archives facilities of non-current Presidential materials; perform reference, preservation, and description activities on these materials as needed.
- Monitor creation, life, and termination of Presidential commissions, task forces, and advisory boards to assure that each follows good record-keeping practices and that its permanently valuable records are preserved.
- Acquire current publications relating to the administration as the core of a reference collection in a future Presidential library.

### 3. Preparation for a future archival depository

- Assist in evaluating proposed arrangements and locations for a future Presidential library.
- Assist in development of necessary legislative proposals for a Presidential library.
- Make long-range plans for transfer of Presidential materials to a permanent archival facility.



3. (continued)

--Formulate a program for solicitation of personal papers relating to the Carter administration that may have permanent historical value.

--Plan for the conduct of an oral history program to be undertaken at a later time.

## STEPS IN THE ESTABLISHMENT OF A PRESIDENTIAL LIBRARY

The Presidential Libraries Act (44 U.S.C. 2107-8) permits the Administrator of General Services to accept on behalf of the United States or to enter into an agreement to use land, buildings, and equipment as a Presidential archival depository. The Administrator may not take title to the property or enter an agreement until he has submitted a report to Congress and observed a 60-day waiting period or received Congressional approval of his plan. His report must include

- a description of land, buildings, and equipment offered as a gift or made available for the use of a Presidential archival depository.
- a statement of terms of the proposed agreement, if any.
- a description of papers, documents, and other historical materials offered for deposit in the proposed Presidential library.
- an estimate of annual cost to the Government to operate the library.

A series of written exchanges forms the legal basis of the offer and the acceptance and provides documentation for the report to Congress. The series would normally include

- a letter offering to donate land and building or enter an agreement for use of property in lieu of transfer for the purpose of establishing a Presidential library.
- a letter from the Administrator accepting the offer pending the 60-day waiting period.
- a letter from the President to the Administrator offering to donate his papers and other historical materials for the purpose of establishing a Presidential library. This letter should include or append a statement of terms and conditions affecting preservation and use of the materials, such as restrictions, and eventual disposition of literary property rights.
- a letter from the Administrator to the President accepting the offer.
- letters from the Administrator to the presiding officers of the Congress reporting on the offers as required.

After the 60-day waiting period or upon Congressional affirmation, the Administrator may proceed with actions to take title and begin operation.



APPENDIXES

Projected FY 1977 Presidential Libraries Operating  
Expenses

Comparative Statistical Summary of Presidential Libraries

Gerald R. Ford Historical Materials (Summary Estimates)

PROJECTED FY 1977 PRESIDENTIAL LIBRARIES  
OPERATING EXPENDITURES

	<u>Program Expenditures</u>	<u>Building Expenditures</u>	<u>Total</u>
Hoover	\$284,000	\$132,000	\$416,000
Roosevelt	\$454,000	\$312,500	\$766,500
Truman	\$482,000	\$384,500	\$866,500
Eisenhower	\$513,000	\$451,500	\$964,500
* Kennedy	\$614,000	*	\$614,000
Johnson	\$655,000	\$803,700	\$1,458,700
* Ford	\$380,000	** \$70,000	\$450,000
* NIXON			

\*Located in temporary quarters in Waltham  
FARC. No costs are specifically identifiable  
for the library.

\*\*Located in temporary quarters provided  
by the University of Michigan at Ann Arbor.

\* NO OPERATIONAL LIBRARY



COMPARATIVE STATISTICAL SUMMARY OF PRESIDENTIAL LIBRARIES

FISCAL YEAR ENDING JUNE 30, 1976

	HOOVER	ROOSEVELT	TRUMAN	EISENHOWER	KENNEDY	JOHNSON
<u>Size of Building</u>						
Gross sq. ft.	28,461	53,474	80,550	83,627 <sup>2/</sup>	---	150,000
Net Usable ft.	25,751	42,545	55,330	70,694 <sup>3/</sup>	9,000	103,000
<u>Site</u>						
Land Area (acres)	33 <sup>1/</sup>	16	13	13.4	10	14
<u>Holdings</u>						
Manuscript on Paper (pgs.)	5,262,106	21,937,021	11,904,000	17,927,714	20,594,775	* 34,077,737
Manuscript on Microfilm (pgs.)	---	913,834	---	84,500	2,511,200	42 6,450,131
Photographs	12,694	112,822	67,934	88,680	65,900	528,435
Motion Picture Film (ft.)	127,774	284,253	249,586	589,930	4,426,881	691,347
Sound Recordings (discs & tapes)	697	4,782	2,411	2,366	2,961	8,554
Oral History Transcripts (pgs.)	9,478	939	19,901	16,574	25,296	17,560
Museum Objects	4,013	21,855	13,102	17,728	12,804	35,810
Books	21,392	35,615	43,428	24,985	22,051	12,378
Other Printed Items	21,284	60,594	59,416	23,162	21,195	16,820
<u>Reference Services</u> (FY 1976)						
Researcher Visits	754	1,770	1,299	625	728	1,055
Items Furnished	0,060	15,159	33,045	8,189	18,606	9,199
Reproductions Furnished	21,728	114,780	74,044	84,410	35,269	50,258
<u>Museum Visitors</u> (FY 1976)	97,342	213,766	351,210	199,099	---	683,810
<u>Cost of Operation</u> (FY 1976)						
Appropriated Funds	\$277,000	\$485,100	\$415,000	\$457,000	\$570,000	\$655,000
Trust Fund	\$111,664	\$189,845	\$422,921	\$244,422	\$ 13,357	\$170,369
Positions Authorized	31	29	36	41	31	42
(as of June 30, 1976)						

\* Recommendations submitted will reduce the 34 mil to half

- ✓ Hoover Park now administered by National Park Service.
- ✓ Library Building, 55,000; Museum Building, 28,677.
- ✓ Library Building, 44,784; Museum Building, 25,910.

January 28, 1977

*100 = 300 sheets*

GERALD R. FORD  
HISTORICAL MATERIALS

## Summary Estimates

*Two year accumulation*

	<u>Number of Items</u>	<u>Cubic Feet</u>
<u>PAPERS</u>		
Congressional		140
NARS		630*
Bentley		160-
Vice-Presidential		
Presidential		6,792
Non-Classified		<u>276</u>
Classified in vault		
SUBTOTAL		7,998
<u>PUBLISHED AND PRINTED MATERIALS</u>		
Congressional		166 <i>444 844</i>
GPO	<i>3.9 MIL PAGES IN 444</i>	<u>641 - 1300 - 2600</u>
Gift Books	1,825	73
Acquired by purchase		<u>3</u>
SUBTOTAL		883
<u>A-V MATERIALS</u>		
Congressional		23*
Presidential		
✓ Still Photographs	<i>244</i>	<u>188** REDUCED</u>
✓ Motion Picture Film		255**
✓ Video Tapes	<i>879</i>	220**
✓ Audio Tapes		128**
Campaign Media	<i>4.3 MIL FT</i>	<u>126**</u>
SUBTOTAL		940
<u>MUSEUM OBJECTS</u>		
Congressional		106 <i>NO NE</i>
Vice-Presidential		120
Presidential		
Foreign		330
Domestic	<i>Gifts returned</i>	<u>770</u> <i>OUT</i>
Bicentennial		<u>360</u>
SUBTOTAL		1,685
	TOTAL	<u>11,507</u>

\*Located at Bentley Historical Library, University of Michigan

\*\*Located at National Archives and Records Service, Washington, D.C.

GERALD R. FORD  
HISTORICAL MATERIALS

Summary Estimates

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\*Located at Bentley Historical Library, University of Michigan

\*\*Located at National Archives and Records Service, Washington, D.C.

✓ Seven Colleges in Atlanta and Ga Southern College  
also include the 211 items listed on the enclosed publications.





MEMORANDUM

THE WHITE HOUSE

WASHINGTON

2

Memorandum for: The President

From: John Dunn

Subject: White House Office Papers.

Enclosed memorandum sets forth general policies concerning White House Office papers.

The policies enunciated represent a compromise between President Ford who did not permit a staff member to keep copies of any recommendations made to the President and President Nixon who was quite liberal in this regard.

Detailed procedures can be issued later, however, these general provisions need to be issued now.

MEMORANDUM

THE WHITE HOUSE  
WASHINGTON

DRAFT PER JOHN DUNN

Subject: White House Office Papers

TO: White House Staff

FROM: Counsel to the President

1. By custom and tradition, all White House Office papers are regarded as the personal property of the President and subject to such control and disposition as he may determine. At the close of the Administration, the entire collection of papers now being created may be expected to be deposited in a Presidential library similar to the libraries that preserve the papers of past presidents.

2. Upon termination of employment with the staff, each staff member will turn over his entire files to Central Files with the exception of any personal files he might have maintained.

3. Personal files include: correspondence unrelated to any official duties performed by the staff member, personal books, pamphlets, periodicals, daily appointment books or log books, folders of newspaper or magazine clippings and copies of records of a personal nature relating to a person's employment or service. Personal files should not include any copies, drafts or working papers that relate to official business, or any documents or records, whether or not adopted, made or received in the course of official business.



MEMORANDUM

THE WHITE HOUSE

WASHINGTON

4. A staff member may make a copy or may retain an extra copy of a document which embodies original intellectual thought contributed by the staff member or any of his assistants, such as the product of research, the notes or drafts of speeches delivered by the staff member, and drafts of proposed legislation; and the copy of any other document written or signed by the staff member that is included in his or her chronological files, along with a duplicate of each related incoming letter or memorandum, may be retained if the original incoming document remains in the Presidential papers; provided, however, no copies may be retained of any documents which come within any of the following categories:

- (a) Material classified for reasons of the national security under Executive Order 11652;
- (b) Restricted data under the Atomic Energy Act of 1954, as amended;
- (c) Information supplied to the government under statutes which make the disclosure of such information a crime; or
- (d) Memoranda of all types written to the President; other documents that contain recommendations or advice made directly or indirectly to the President; proposed drafts of speeches or statements for the use of the President; schedule proposals to the President;

MEMORANDUM

THE WHITE HOUSE

WASHINGTON

briefing papers used in discussions with the President and records made of such discussions; minutes of meetings of the EPB, ERC, and similar cabinet-level organizations; personnel recommendations or evaluations, and the like.

- (e) No exceptions will be made for materials listed in paragraphs (a) through (c). Exceptions to instructions in paragraph (d) can be made with the express consent of the Counsel to the President.
- (f) The discretionary authority granted in (e) is expected to be exercised sparingly on a document by document basis and should never exceed a few documents.





MEMORANDUM

THE WHITE HOUSE

WASHINGTON

DISPOSITION OF PRESIDENTIAL PAPERS

3

A study commission was established by Senate Bill 4016 on December 19, 1974 to determine status of records of the President, Vice President, members of Congress and Federal Judges.

Commission consisted of:

Senate - 2	House - 2
State Dept. - 1	White House - 1
Justice - 1	Defense - 1
Library of Congress - 1	Archivist - 1
Chairman - Honorable Herbert Brownell	

General Conclusion # 1

- a. "Records accumulated in connection with official duties should be the property of the United States Government."
- b. The officeholder should have a specified and limited interval over access to his papers and records.
- c. Not retroactive

General Conclusion # 2

- a. Same as a. above.
- b. A group headed by former Attorney General Brownell thinks the Freedom of Information Act should apply rather than paragraph b. above.

MEMORANDUM

THE WHITE HOUSE

WASHINGTON

Recommendation

Approve legislation that reflects conclusion # 1. The Archivist wants all the papers -- even if we must wait awhile to get them.

Note -- We did this in Georgia 3 years ago without this expense and delay.

## General Conclusion

As a result of its study, the Commission realizes that the laws, regulations, and practices which currently govern the disposition of the records and papers of Federal officials have led to the preservation and availability of much significant documentary material. In addition, the Commission is agreed that the primary reasons for this preservation should be 1) to aid in the continuing operations of the government, 2) to provide evidence for the public accountability of elected and appointed officials, and 3) to make it possible for scholars to analyze and reconstruct history.

In order to achieve these goals, the Commission believes that the records accumulated in connection with the official duties of the President, Vice President, Members of Congress, and Federal Judges should be the property of the United States Government. But, because the papers of the officials in the different branches of government vary as much as the mandated functions of the officials, the Commission feels that the papers need not, and indeed should not, be treated in exactly the same manner.

Thus, for example, a great deal of attention was given to the practical problems associated with collecting, cataloging, and housing the papers of all Members of Congress. While no one disputed the value to history of a small proportion of each of these collections, the Commission reluctantly concluded that the practical problems and costs inherent in handling the enormous mass of material probably outweighed the value of the individual papers. Thus, the Commission recommends incentives for the preservation of this material. For different reasons, the same conclusion has been reached for the papers of Federal judges.

*contribution?*

SEE TOP OF NEXT PAGE TAB--



The Commission is not unmindful of the fact that Presidents and all other federal officials have a legitimate interest in preventing premature disclosure of documents of a sensitive nature. Accordingly, the Commission believes it is necessary to assure the officeholder an interval of control over access to his papers and records. Without such assurance, the self-protection which animates all persons, and especially those exposed to the uncertainties of political life, could lead to a limited record of activity. Naturally, however, any interval of control should be specified and limited.

Furthermore, it should be noted that the Commission's recommendations are wholly prospective and are not meant to apply to records and documents created prior to the adoption of any legislation which results from this report.

Extract: Thus, a number of Senators expressed the opinion that, as Senator Ervin put it, "when an official...makes records at the expense of taxpayers,... in equity and good conscience those records belong to the public."

*See enclosed document setting forth position of attorney General Brownell.*

# Document Guardians Split Over Ex-Presidents' Access

United Press International

After a year and a half of study, a special commission is proposing a law to establish that the papers a President generates belong to the people of the United States and are not his personal property.

But the Public Documents Commission, created by Congress in reaction to former President Richard Nixon's continuing effort to keep his White House tape recordings, has reached no agreement on whether a retiring Chief Executive should be permitted to restrict access to papers he generated.

As a result, Chairman Herbert Brownell Jr., Attorney General in the Eisenhower Administration, announced when the commission met Thursday to draft its March 31 report that he would submit a separate report to Congress and President Carter.

Under Brownell's plan, a citizen could use the Freedom of Information Act to demand and sue for instant access to many of the documents created by presidents and their aides, members of Congress and judges. Internal documents—memos from an official's staff, for example—would remain private.

The act now applies only to docu-

ments generated by government agencies.

Most of the panel's 17 government officials, members of Congress and historians argued that the Brownell proposal would result in the public learning less, not more.

Rejecting compromise overtures, Brownell said the division is "irreconcilable."

His opponents said his proposal would deter officials from committing controversial matters to paper. Said one member privately, "The paper shredders really would operate."

Lucius D. Battle, a former ambassador and State Department official, said he did not see how the White House could function if its records were subject to immediate public access.

Brownell argued, "Congress has created a Freedom of Information Act that has worked for 10 years. The time has come to extend it throughout government."

Both sides will recommend legislation declaring the papers of presidents public property, with only personal papers exempted.

The panel's draft report also treats papers of judges and members of Congress that way, but congressional members may resist that proposal. Presidents always have treated their papers as personal property.

NOTE: The archivist wants ALL the records even if we wait awhile to get them.

WASHINGTON POST





MEMORANDUM

THE WHITE HOUSE  
WASHINGTON

A

OVERSIGHT COMMITTEE

Senators Nunn, Byrd and Percy in the Regulatory Reform Act of 1977 provide for Oversight Committee review of agency/department rules and regulations before they are published. This is listed as a solution to a major paperwork problem by the Commission on Federal Paperwork (Copy enclosed). This only adds another layer of Bureaucracy and will further delay program implementation/delivery of services to the people. What is needed is to remove layers of requirements, not add more and more.

Recommend that you veto any such legislation that should reach your office.

PROBLEM 5 VAGUE GOALS, OBJECTIVES, STANDARDS AND REQUIREMENTS, WHICH LEADS TO DEFENSIVE PAPERWORK AND RED TAPE

- SOLUTIONS
- CONGRESSIONAL OVERSIGHT OF LAWS, REGULATIONS AND OPERATIONS
  - NATIONAL OR REGIONAL STANDARDS
  - PERFORMANCE STANDARDS AND COMPLIANCE CRITERIA
  - AVOIDANCE OF PROCESS REPORTING; RELIANCE ON RESULTS REPORTING
  - FIXED POINTS OF ACCOUNTABILITY/RESPONSIBILITY

- - -

Illustrative Recommendations

- Recommend the Social Security Administration Central Office set nationally uniform standards in lieu of the present vague, and conflicting standards developed by multiple offices and agents
- Department of Labor should review the reporting requirements of the CETA program to eliminate any requirements that exceed the Congressional mandate for a "flexible and decentralized system of manpower programs"
- Department of Labor should develop criteria for "levels of effectiveness" against which State performance can be more readily assessed in the OSHA program





5  
House

NATIONAL RECORDS MANAGEMENT EFFORT

Buried 2 levels below GSA

\$3.4 mil. effort

(2.4) Appropriated  
(1. ) Reimbursable

Several of the important positions are occupied by historians who are ill-prepared to conduct a managerial program. Also supervised by historians.

There is a mix of cultural-managerial and service functions

The entire program including the agencies is marginal at best.

# *Proposed NAT'L Records mgmt effort.*

This proposal is predicated on the fact that excessive paperwork, red tape and delays can be eliminated even though no one has ever been able to do it before.

Proposed organization and a dedicated group of people working full time will provide a sound basis for Government service to reach the people in an efficient, economical and effective manner.

INCL 5

## SUGGESTED NATIONAL RECORDS MANAGEMENT EFFORT

1. Establish a separate National Records Management office that would be responsive to the President. (It is now under the Archivist of the U. S.--~~Dr. Rhodes--he would not object.~~) **DOES OBJECT**

**POLITICAL APPOINTEE BY ADMINISTRATOR GSA**

a. It could serve as a separate commission or be attached to the Office of Management and Budget (OMB).

b. In addition to current records management responsibilities, the office would also be responsible for:

(1) Phase-in and assumption of duties of the Commission on Federal Paperwork as the commission expires and,

(2) Monitor and take corrective actions in the delivery of services within the Government, but primarily at the ten regional offices in the United States where services usually flow to the people. See Enclosure 5 for organizational chart for records management.

*(3) OMB functions*

2. Staffing.

a. The National Records Management staff is 100 in the Washington area and 50 in the records offices of the regions. These figures are exclusive of the agency/department records management staffs.

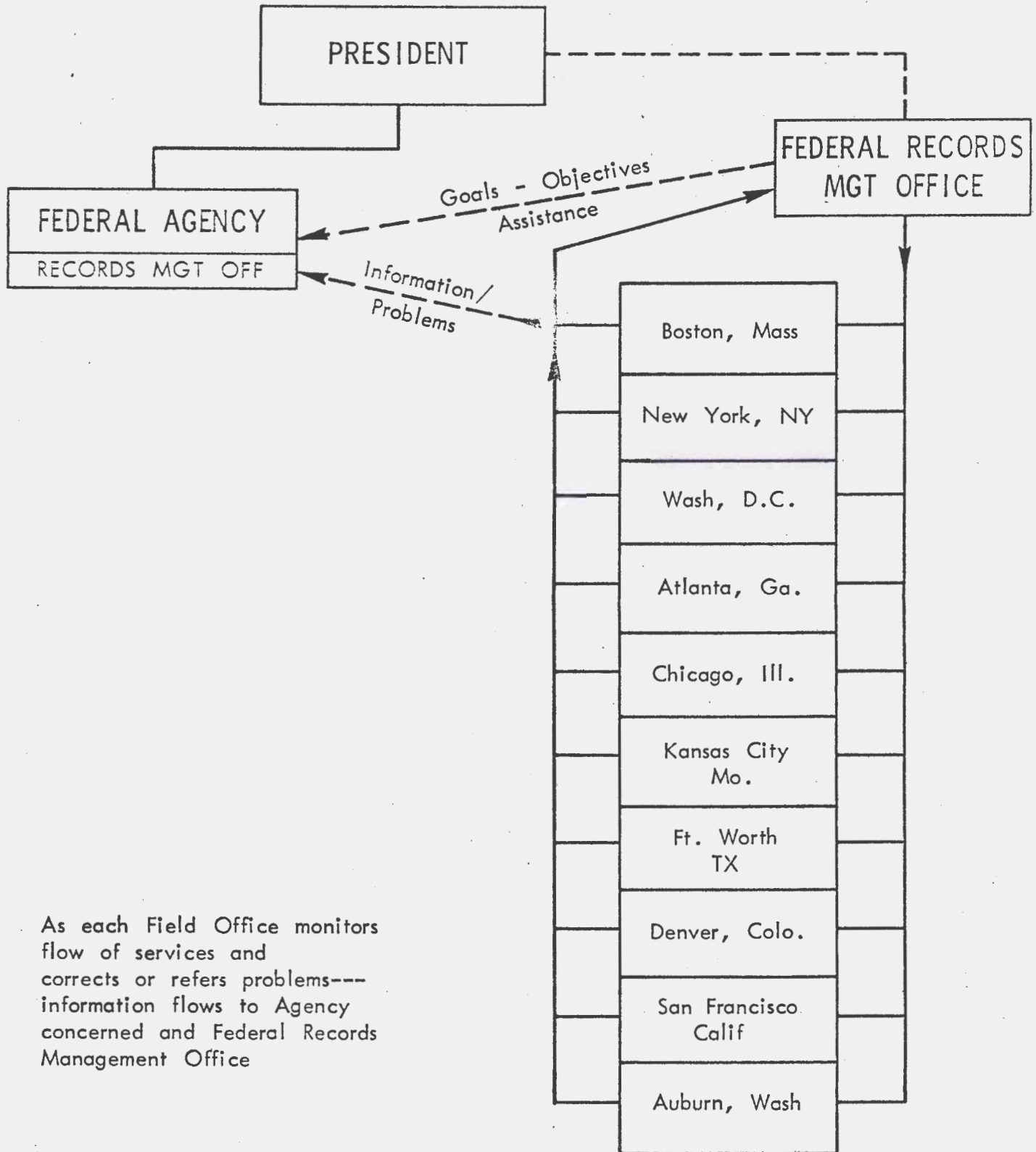
b. The agencies/departments will need to supplement their records management staff with management analysts and systems personnel from within the department. Likewise, the regional records offices will need some increased staff from departments/agencies in the area (management analysts--systems personnel--auditor).

c. The National Records Management staff will need a space for an outstanding records manager from industry and two or three personnel from the Commission on Paperwork Management. The full 100 staff may not be needed at the national level. The key to success is a strong agency/department staff.

*NOTE: The Federal Paperwork Commission plans to submit recommendations similar to those above.*



# ORGANIZATIONAL CHART FOR RECORDS MANAGEMENT



Recommend that someone be assigned records  
management responsibilities within the White  
House

DO NOT RE MOVE  
white House

Dr. Ruth Thomas is an educator, a member of the Board of Regents of the Institute of Records Managers, a former consultant, Certified Records Manager, a former member of the National Records Management effort and currently Chief of Information Management for the Bureau of Immigration and Naturalization.

She is well respected by her colleagues in the Records Management profession. Her assessment of Records Management in the Federal Government is enclosed.



UNITED STATES GOVERNMENT

# Memorandum

TO : [REDACTED]

DATE: March 18, 1977

FROM : Ruth Thomas

SUBJECT: Records Management in the Federal Government

Your offer to consider my views on Records Management in the Federal Government is appreciated. It is particularly heartening to know that the new administration recognizes the importance and need to revitalize efforts in this area.

Probably the first concern, and by no means the most important, is the title Records Management. The title is not only limiting, but a misnomer in relation to what is going on in the field today. Actually we need a title similar to "Information Management." Such a title would describe the scope of our activities and would enhance public relations (if for no other reason than to change the visual imagery created by the title "Records Management").

The most important concern to Records Management professionals in the Federal Service is to impress upon Federal administrators, the Congress, and the Executive the importance and urgency of the paperwork problem of the Federal Government. We know that in industry the fourth largest expense is information management--following in this order (1) personnel expense, (2) materials, and (3) transportation. (Actually information management is approaching third place rapidly.) We also know that materials and transportation are lesser expenses in the Government than in industry; therefore, information management is surely the second largest expense in the Federal budget. We have only documented the expenditure of \$20 billion a year for Federal paperwork management, but most of us who are familiar with that documentation know that we see only the tip of the iceberg. Given the political climate in which we bureaucrats operate, it follows that the most expedient means to getting our message across is through the White House.

Next, it would be good to examine the current effort in this endeavor. Each agency has its own unique records management program--usually fragmented with various responsibilities in every conceivable component of the organization. And the records management program itself is usually considered a file and storage operation--regardless of what the functional



*Buy U.S. Savings Bonds Regularly on the Payroll Savings Plan*

~~SECRET~~  
March 18, 1977

statements show. To compound the woes of the Federal records manager, Records Management is considered to be the most expendable function of the organization and is therefore the first component hit with reductions in force and cut budgets. Further, when efforts are made (usually in response to some crisis) to upgrade records management, it is seldom approached as a systems effort but rather a patchwork attempt to allay the current brush fire.

The Records Management leadership role is lodged with the National Archives and Records Service under the General Services Administration--an unlikely alliance if ever there was one. It would be difficult to give a logical explanation for the placement of a management function in an organization whose major function is property management.

As if Federal records management problems were not insurmountable enough due to the magnitude of our paperwork, we find that the internal Federal Records Management leadership role has historically been subjugated to that of archival interests--this despite the fact that only 5 percent of the paperwork with which we are concerned is of archival or historical value. Nationwide the Federal Government has allocated approximately 150 positions to grapple with the internal Government leadership role associated with the second largest expense in the Federal budget and has placed the function in an organization, National Archives and Records Service, that devotes approximately 5 percent of its total budget to this endeavor, while devoting 69 percent of its budget to archival interests (FY 1977).

If we are ever to reverse trends in Federal paperwork management, we must come to grips with the root cause of the problem. It is my firm conviction that while most Federal Government administrators are well-intentioned, their management capability is mediocre at best. This is not due to either the intelligence or motivation of the individuals administrators, but rather to a set of circumstances that preclude their attaining high levels of achievement. Federal Government managers on the whole have come up through the Civil Service ranks and have been promoted, via the Peter Principle, to positions of incompetency. This because (1) they do not have the educational background required of management in today's highly technological work, (2) the training they have received is hit-and-miss, (3) they are

~~March 18, 1977~~  
March 18, 1977

more often than not misplaced in relation to their experience and background, (4) they have little or no guidance, and (5) there is practically no penalty or discipline for those who cannot produce.

According to the charter of the Office of Management and Budget (OMB), this agency is to (1) "....aid the President to bring about more efficient and economical conduct of Government service, (2) .... promote ....administrative management, and advise the executive departments and agencies of the Government with respect to improved administrative organization and practice, and (3) keep the President informed of the progress of activities by agencies of the Government with respect to work proposed, work actually initiated, and work completed...." With this in mind, it is difficult to understand why internal Records Management, surely an administrative function, is in General Services Administration.

To the best of my knowledge, OMB has given scant attention to the improvement of management practices. Therefore, it appears that Records Management or Information Management would be the ideal vehicle for the President to use to launch a management improvement program across the board. And if the President were to decide to make an all-out effort to improve Government management practices, it would appear that he would have two logical choices for its structure--to develop a separate organization reporting directly to the White House or place all management functions together in OMB with reporting responsibility to the White House (keeping in mind that OMB now has responsibility for records management related to public reporting).

I think that it is of utmost importance to place all management and records management improvement functions together. If Records Management improvement is made a separate entity, it could operate optimally and still have no impact unless it had not only the backing of records managers but all administrators who are assigned policy-setting and decision-making responsibilities.

As for the structuring of Archives and Records Management--I have no problem with the continued alliance if it were put into perspective--that is placing Archives in an adjunct role as it is found in the entire business world. Archives is a small (5 percent) interrelated part of Records Management and I would be opposed to its becoming a separate entity. We simply need to put the positions, finances, and backing in the order of the magnitude of the problem--otherwise neither



~~March 18, 1977~~  
March 18, 1977

Records Management nor Archives can flourish. Certainly, we can no longer afford the assignment of the leadership role of the second largest financial outlay in Federal Service (information management) to an organizational element whose personnel haven't the experience, background, or interest to deal effectively with the problem.

In the end, four influences must be brought to bear on the Federal paperwork problem--that of the agency records managers, the agency administrators, the organizational element responsible for management leadership, and the President and/or Congress.

We must revert to the original intent of the Federal Government--to provide service to the citizens of this country and to do so as effectively and at as little cost to the taxpayers as possible. There is no doubt in my mind that the public can be served and that it can be served far more efficiently at less expense than is now being done.

*L. Ruth Thomas*

MEMORANDUM

THE WHITE HOUSE

WASHINGTON

PAPERWORK MANAGEMENT COMMISSION

The Commission is doing an excellent job of solving as many major problems as possible while identifying problems areas and recommending solutions.

The savings have greatly exceeded the investment. It is a refreshing approach to the old method of "Study and Recommendation".

The Commission expires on October 3, 1977.

The Commission has had unlimited funds and has been able to assemble a very distinguished group. Their problem identification and problem solutions would be substantially beyond the ability of the average government employee to understand and translate into action programs.

Recommend that one/two key members of the Commission be moved to the Federal Records Management Office and be given primary responsibility for getting the recommendations implemented.

THE WHITE HOUSE  
WASHINGTON

July 25, 1977

Stu Eizenstat

The attached was returned in the President's outbox and is forwarded to you for information and appropriate handling.

Rick Hutcheson

cc: Bob Lipshutz  
Jack Watson  
Bert Lance  
Frank Press

Patent Policy



THE WHITE HOUSE  
WASHINGTON

	FOR STAFFING
	FOR INFORMATION
✓	FROM PRESIDENT'S OUTBOX
	LOG IN/TO PRESIDENT TODAY
	IMMEDIATE TURNAROUND

ACTION  
FYI

	MONDALE
	COSTANZA
/	EIZENSTAT
	JORDAN
/	LIPSHUTZ
	MOORE
	POWELL
/	WATSON
/	LANCE
	SCHULTZE

	ENROLLED BILL
	AGENCY REPORT
	CAB DECISION
	EXECUTIVE ORDER
	Comments due to Carp/Huron within 48 hours; due to Staff Secretary next day

	ARAGON
	BOURNE
	BRZEZINSKI
	BUTLER
	CARP
	H. CARTER
	CLOUGH
	FALLOWS
	FIRST LADY
	HARDEN
	HUTCHESON
	JAGODA
	KING

	KRAFT
	LINDER
	MITCHELL
	MOE
	PETERSON
	PETTIGREW
	POSTON
/	PRESS
	SCHLESINGER
	SCHNEIDERS
	STRAUSS
	VOORDE
	WARREN

11:45

THE PRESIDENT HAS SEEN.

THE WHITE HOUSE

WASHINGTON

July 25, 1977

*Stu - but my basic  
orientation is toward  
Gov't ownership of  
patents -  
J.C.*

MEMORANDUM FOR: THE PRESIDENT

FROM: STU EIZENSTAT *Stu*  
BO CUTTER *BC*  
FRANK PRESS *FP*

SUBJECT: PATENT POLICY

Last month Admiral Rickover stated that the Government's patent policy "...results in large companies, who get the lion's share of the Government contracts to develop monopoly positions at Government expense... Waivers of Government rights to patents developed at Government expense should be limited to those rare cases where there is no other way of obtaining essential work or in cases where the Government enters into a cost sharing arrangement with a contractor who puts up more than 50 percent of the development costs."

You asked our advice on both points. We have convened a series of meetings with the Admiral's staff and with our own staffs for the purpose of clarifying the issues.

We all believe that the particular perspective of Admiral Rickover's experience -- nuclear power and national security -- is an important one but the experience in the Defense Department and on the domestic side reflects additional complexities as well as a range of conflicting views within the Executive branch.

Government patent policies have evolved from about 19 different statutes covering specific R&D programs or agencies and from Presidential statements covering all other programs and agencies. They cover a number of matters, but the basic issue is whether the contractor or the Government should receive titles to inventions developed under contracts, with the Government.

The statutes generally require title in the Government and the Presidential statements call for title in the contractor under certain circumstances and title in the Government under other circumstances. However, both the statutes and the Presidential statements provide considerable flexibility by authorizing waivers.

On the basic issue of title in the Government or contractor, there is a wide range of conflicting views within the Executive branch. The main concerns are how to encourage contractors to participate in government programs, how to protect the government's investment in R&D programs, how to promote commercialization of government sponsored inventions, and how to avoid monopolization by big companies. These are currently being coordinated in connection with a bill introduced by Congressman Thornton which moves in the direction contrary to that of Admiral Rickover. Congressman Thornton is expected to hold hearings in September or October. We believe we have sufficient time to narrow the areas of disagreement among the departments and will continue to monitor the developments closely. We see no need for you to take immediate action, and meanwhile, we recommend that judgment on the basic issue of title in the Government or contractor be withheld.